

## **Statewide Telecommunications RFP Statement of Work**

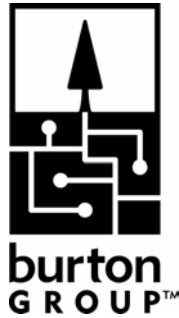
Contract No: AD040012

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October 30, 2003

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A. State of Arizona Telecommunications Roadmap

*Includes: A. List of Related Statewide IT Contracts; B. Project Oversight Diagram*

B. ATS Customers

C. Voice Diagrams

D. Enterprise Architecture Standard

E. Hardware Inventory

F. Circuit Inventory

G. Employee Data

H. Arizona Telecommunications Services (ATS) FY 2004 Rate Schedule

I. ATS Maintenance Contracts

J. Minimum Acceptable Service Levels

K. Governor's Memorandum to State Agency Directors

L. ATS Cost Model FY 2003

M. Table of Related Policies, Standards and Procedures URLs

N. State of Arizona PBX Systems (as of November 2002)

O. State of Arizona Key Systems (as of November 2002)

P. State of Arizona Executive Branch Agencies (including FTEs)

Exhibits

A. Price Comparison

B. Pricing Schedule

C. Price Buildup

## **1.1 Executive Summary**

### **Overview**

HB 2533 requires the Government Information Technology Agency (GITA), in consultation with the Arizona Department of Administration (ADOA), to develop an actionable Request for Proposal (RFP) for the privatization of the State of Arizona's telecommunication services. The telecommunications outsourcing project is supported by Governor Napolitano, who is requiring participation by all executive branch agencies.

The telecommunications outsourcing RFP must receive approval from the Information Technology Authorization Committee (ITAC) prior to submission, on October 31, 2003, to the Joint Committee on Capital Review (JCCR). To facilitate ITAC review, the RFP and related 5-year telecommunications roadmap (Roadmap) are described in this Executive Summary.

### **Goals**

As contemplated by HB 2533, the goal of the telecommunications outsourcing RFP and Roadmap is the creation of a cost-effective, secure telecommunications system that lays the foundation for a statewide converged voice, video, and data network. The State wishes to overcome the inefficiencies of disparate systems in agency silos, increase communication between agencies, and improve government services. Outsourced management of telecommunications will also provide a foundation for important initiatives such as social services reform and criminal justice integration. Additionally, the project will positively impact delivery of broadband services to rural Arizona.

### **Roadmap**

The statewide telecommunications Roadmap (an exhibit to the RFP) provides a five-year vision for the State's telecommunication system and for the creation of a converged statewide network. The Roadmap reflects a phased approach to outsourcing recommended by industry experts. This phased approach allows the State to quickly build on successful implementation but significantly lowers the risk to the State. The Roadmap schedules migration of all executive branch agencies into the outsourced environment during the first 2 years, with procedures described in the RFP.

The Roadmap also contemplates possible addition of other Arizona governmental organizations to enable additional economies of scale and increased intergovernmental communications. In addition to other RFP criteria, RFP respondents will be evaluated based on their proposal for Roadmap

implementation as well as their experience implementing networks and working with organizations of similar size and complexity to the State of Arizona.

### **Scope of RFP**

The successful respondent to the RFP (referred to as the “Service Provider” or the “Contractor”) will manage, within a short period of time, all voice and shared data networks for the State. The Arizona Telecommunication System (ATS) portion of ADOA currently provides some voice and data services to 107 state agencies at over 267 locations throughout Arizona. All of these ATS customers will receive services from the Service Provider on contract award.

Additional agencies will be folded into the outsourced environment as called for in the Roadmap (within the first 2 years) or as they have a need for new or improved telecommunication services, whichever occurs first. For the State to continue to migrate additional agencies/locations to the outsourced environment, the Service Provider must continue to meet its performance obligations under the Contract.

### **Services**

#### Data Services

The Service Provider will assume management and operation of the shared data network called MAGNET (Multi-Agency Network). MAGNET is a Fiber Distributed Data Interface (FDDI) and gigabit Ethernet network connecting 29 buildings on the Capitol Mall and 2 buildings in the Tucson complex.

The network provides customers with high-speed data connectivity as well as Internet access. The Service Provider will also manage the multi-protocol backbone WAN connecting geographically dispersed agency sites around the State, including over 172 sites connected via Frame Relay (120 to Phoenix, 52 to Tucson) and 5 sites connected via ATM. The Phoenix and Tucson telecommunication hubs are connected by 4 OC-3/DS3 links.

The RFP requires the Service Provider to maintain current services by either using current infrastructure or proposing new technologies. The Service Provider must provide 24 x 7 x 365 monitoring of the data network with provisions for quality-of-service features. The following is a summary of Data Services to be provided, as detailed in the RFP:

• Statewide Connectivity	• Network Performance
• Multimedia Transport	• Moves, Adds and Changes (MACs)
• Virtual Private Networks (VPN)	• Configuration Change and Fault Management

### Voice Services

The Service Provider will initially provide voice services to approximately 14,000 telephone subscriber lines located in the Capitol Mall Complex in Phoenix and on the Tucson Complex, thereby providing services to approximately 30 percent of the State's 42,000 employees.

In order to leverage the State's existing investment and ease the transition to an outsourced environment, the Service Provider will have the option of managing the Nortel MSL-100 in Phoenix and 2 Option 81C telephone systems in Phoenix and Tucson. In addition, the Service Provider will have the option of managing 3 Octel voicemail systems, 2 Octel 350s in Phoenix and 1 Octel 250 in Tucson. The Call Center using Nortel's Symposium product currently have 850 users programmed into the system with 350 to 400 concurrent users. The Service Provider can also assume operation of a Periphonics Interactive Voice Response system as well as a Melita Predictive Dialer system (currently used by the Department of Revenue). The Service Provider will have the option of proposing other solutions as well. In any case, the Service Provider will have opportunities to recommend changes in infrastructure, particularly using new technologies, during the life of the Contract.

Additional telephone services of other major agencies will be folded into the outsourced environment in the first 2 years. The Service Provider will propose whether to manage all voice traffic from a single switch (including or excluding VOIP services), retain one or more additional switches, or proposed new technology, all subject to oversight by the State.

The following voice services (detailed in the RFP) will be managed by the Service Provider:

• Integrated Voice Switching System	• Call Center(s)
• Telephone Sets with Calling Features	• Calling Cards
• Local and Long Distance Services	• Configuration Change and Fault Management
• Interactive Voice Response	• Moves, Adds and Changes (MACs)
• Integrated Voice Mail	• Network Performance

### Help Desk Services (*Improved*)

Help Desk Services to be provided by the Service Provider as detailed in the RFP are:

• 24 x 7 x 365 Support	• Life-Cycle Management of Help Calls
• Single Point-of-Contact	• End-User Satisfaction Surveys
• Real-Time Updates re: MACs	• Problem Resolution

The RFP improves services to State customers by extending the help desk to a 24 x 7 x 365 operation. At the present time, after-hour calls are routed to a mainframe support center whose staff has little or no experience in voice/data problem resolution.

#### Statewide IP Address Management (New)

Currently, each agency manages its own internal IP address assignments, thereby permitting duplication that could impede movement to IP telephony. The Service Provider will be required to review all existing IP address assignments, provide recommendations for common addressing to enable seamless statewide communications and manage the resulting statewide IP address assignments.

#### **Financial**

An analysis of the current ATS cost model will be included in the RFP. All future pricing for voice and data services will be established in the Contract. The Service Provider will bill agencies directly based on contract prices. The initial contract will contain pricing schedules that contemplate reduced pricing based on the addition of agencies or locations and resulting economies of scale. The State will have the right to audit the Service Provider's bills and billing practices at any time.

The Service Provider may submit benefit sharing and cost reduction proposals to the State for its consideration, both in response to the RFP and during the term of the resulting contract.

#### **Convergence Plan**

In addition to the convergence plan (included in the proposal for Roadmap implementation) submitted and evaluated with its RFP response, the Service Provider must submit to the State a more detailed convergence plan within 180 days of contract commencement. As the State moves to a converged network, increased savings will be realized from decreases in overhead and duplication, such as the elimination of redundant networks and circuits and reductions in moves, adds and changes.

#### **New Technology**

The Service Provider may recommend changes to the State's technology in its proposal and/or during the term of its Contract. Decisions on asset replacement



will be made by the State. The State can pursue leasing or other financing arrangements for new technology as it migrates to that technology.

### **Additional Work Process**

Major changes in the Contract will be handled by a formal “Additional Work Order - Requirements Contract” as described in the Contract Special Terms and Conditions. This process will involve a formal assessment by the Service Provider and the agency involved of the costs and proper approach to implementation of the major change. If the State and the Service Provider can’t agree on implementation of the additional work process, the State can consider other outsourcing avenues.

### **Asset Ownership**

The State will maintain ownership of all current telecommunication assets because:

- most of the existing assets are paid for and fully depreciated;
- some assets were purchased with federal funds, impacting the State’s ability to sell them; and,
- the State does not want to pay for the current assets again in its service rates.

However, the State is willing to look at vendor proposals for alternative for future assets under the following conditions:

- the State wants to avoid an expensive payout for assets (without available appropriations) at contract termination or expiration; and
- the State wants to retain control over the vital components of its infrastructure at the end of the contract.

The Service Provider will not be charged for the use of any State owned assets in fulfillment of providing services in this RFP.

### **Data Network Infrastructure Upgrades**

It is important that the State maintain a robust data network to continue to provide quality telecommunication services to State agencies. The Service Provider will be responsible for maintenance and upgrades to the State’s data infrastructure. The vendor community will be provided with sufficient information in the RFP to estimate the cost of such upgrades and bid their contract rates accordingly. The Service Provider will provide the State, at least annually, with an itemized list of infrastructure purchases. The Contract will provide that all data network infrastructure upgrades shall be incorporated into (and become part of) the State’s network and shall be State assets.

### **Commodities**

The State will maintain and continue to update a portfolio of statewide telecommunication “commodity” contracts to insure continuous competition and reduced prices on carrier services and telecommunication hardware, software and other commodities. In addition to supporting all state agencies, these contracts support and aggregate the buying power of the rural communities, cities, counties, schools and other governmental organizations in the State.

The relationship of the Service Provider to the commodity contractors will be as follows:

Carrier Services - The Service Provider will handle all interactions with the carrier services contractors (except contract interpretation/modifications) on behalf of the State. Managing payments and services under these contracts will allow the Service Provider to identify opportunities for consolidation and cost savings across all agencies. The Service Provider will bill the agencies and maintain a payment system for payments to the carriers.

Hardware and Software - The Service Provider will recommend and approve purchases of agency- specific telecommunication hardware and software, subject to signing of purchase orders by individual agencies. The affected agency will be billed by the commodity vendor (not the Service Provider) and will own the underlying commodities. The Service Provider will manage installation and operation of the commodities.

Maintenance of Statewide Assets - The existing maintenance contracts for statewide assets will be utilized by the Service Provider.

If the Service Provider can provide equivalent products or services to those otherwise available to the State, at reduced prices, it may seek approval from the State to provide such products or services.

### **Enterprise Architecture and Security**

All activities of the Service Provider must comply with the State’s Enterprise Architecture, which will continue to be updated in support of convergence. The Service Provider must also meet the State’s security requirements, which are being updated as part of the State’s Homeland Security efforts.

### **Administration**

Oversight of contract operation will be handled by a State Telecommunications Program Office. The office will likely have 2 or 3 employees. Proposals from the Service Provider will be reviewed and commented on by the Program Office. Only proposals that affect statewide infrastructure or statewide pricing will

require approval of the Program Office. Proposals that change contract pricing or scope will be negotiated by the State Procurement Office (SPO).

### **Protective Provisions**

The RFP will provide minimum acceptable levels of performance and will have detailed termination provisions. The Service Provider will be required to meet the State's insurance requirements. Liquidated damages and a performance bond may also be required.

### **Evaluation**

The RFP responses will be evaluated based on criteria set forth in the RFP.

### **The PIJ Process**

Each agency will continue to be responsible for Project Investment Justifications (PIJs) for their individual telecommunications projects, as mandated by statute. These PIJs will enable GITA and ITAC to provide oversight to Service Provider's performance during the contract term and Roadmap implementation.

This Executive Summary is provided as an overview for convenient reference. It does not summarize all provisions of the RFP and it does not limit the meaning of any provisions in the RFP. In the case of any conflict between this summary and the provisions of the RFP, the detailed provisions control.

## **1.2 Overview**

The State of Arizona is a national leader in state government information technology. In addition to being one of the first states to create a state chief information officer, Arizona uses best practices in state government information technology planning. The benefits of the State's efforts have been felt throughout the State in improved customer service, increased accessibility to State government, and greater access to information technology.

Today's challenges will be met with the same innovation and resolve that have defined Arizona and information technology (IT) will continue to be a key enabler of change. The State will build on the foundation of planning and oversight that have made Arizona a leader in government information technology to streamline and improve government efficiency.

In 2002, the Joint Legislative Budget Committee (JLBC) requested GITA and ADOA to prepare a report on options available to the State for providing telecommunication services, including service delivery changes or/and enabling agencies to procure services to reduce telecommunications costs.

In the course of preparing that report, GITA joined with ADOA to research various options, speak with potential contractors, and review costs associated with the current service model. They also investigated approaches taken by other States to improve service and cut costs. The resulting report dated November 1, 2002 can be found at [http://www.ats.state.az.us/JLBCrpt/Report\\_Menu.htm](http://www.ats.state.az.us/JLBCrpt/Report_Menu.htm).

The following methods for success were outlined in the JLBC report

- cost-effectiveness from a statewide perspective,
- efficiency of service delivery to ensure customers are able to purchase services they need at competitive prices with performance governed by service level agreements,
- flexibility to allow the State to transition to new services over time, regardless of technology,
- making any service transition transparent to citizens and State employees,
- compatibility with the State's Enterprise Architecture, and
- providing for required interoperability and connectivity.

After careful analysis and consideration of all factors, Arizona's Legislature has concluded that privatizing telecommunication services will best enable the State to meet these objectives.

HB 2533 (46th Legislature, 1st Regular Session) directs GITA, in consultation with ADOA, to develop an actionable request for proposal (RFP) for the privatization of State telecommunications services.

In accordance with Governor Janet Napolitano's Vision for IT in the State of Arizona, and in support of the RFP process dictated in 2003 Session Laws, Chapter 0263, HB2533, ADOA is issuing this Request for Proposal (RFP) to outsource management and operation of the statewide telecommunications network. The outsourcing RFP is the first important step in the creation of a statewide telecommunications system that is capable of supporting voice, data, and video networks.

This RFP calls for the outsourcing of the voice and data networks managed by ATS that currently provide services to 107 State agencies. In addition, the Contractor will manage the ATS fiber ring in the Phoenix Capitol Mall, the core network in the Tucson campus, the network infrastructure connecting State offices in Phoenix and Tucson, and other data lines throughout the State. This RFP will also allow the State to add additional customers, locations, and services during the course of the Contract to continue to build a statewide converged network.

To support this effort, the State has developed a Statewide Telecommunications Roadmap (Roadmap) (see Attachment A). The Roadmap outlines a plan to move the State to a converged voice, data, and video network supporting the State's future business needs. The purpose of the Roadmap is to explain the State's goals and strategies and some of the foundational steps it must take to achieve its objectives. The Roadmap places this RFP in perspective as a cornerstone on the State's road to an efficient and converged voice, data, and video network. Convergence reduces the redundancy of multiple networks while enabling the provision of new services.

This RFP provides the State of Arizona with an opportunity to outsource a portion of their telecommunications requirements while providing a contractual vehicle to add work, including the addition of other State agencies and customers, through an Additional Work Process to provide the fully converged network described in the Roadmap. The Roadmap thus serves to define the full scope of the work to be undertaken by the Contractor over a period of time should the State of Arizona award additional tasks under the Additional Work Process.

### **1.3 Background and Project Goals**

Arizona Revised Statutes (ARS) 41-798, 41-801 and 41-713, mandates that the ADOA's Arizona Telecommunications System (ATS) is responsible for providing telecommunications capabilities and services to State agencies and political subdivisions. The State's telecommunications requirements are fulfilled through public-private relationships, statewide contracts, and State-owned campus infrastructure in Phoenix and Tucson.

ATS was created in 1951 primarily to negotiate long distance telephone rates for the State but evolved over time to provide statewide telecommunications services. In 1988-89, State-owned centralized telephone systems were installed in Phoenix and Tucson. In June, 1997, House Bill 2440 amended the Arizona Revised Statutes to extend the role of ATS to include any transmission of voice, data, video or graphic images.

In response to requirements in House Bill 2706, ADOA and GITA were tasked to review telecommunications options and submit a report to the Joint Legislative Budget Committee (JLBC) outlining opportunities to improve service delivery and decrease operations costs associated with statewide telecommunications services. The impetus for requesting this report was information provided by various groups to the Appropriations Committee suggesting the State could achieve significant cost savings by privatizing telecommunications service delivery and by migrating to a Voice over Internet Protocol/Internet Protocol (VoIP/IP) telephony telecommunications environment.

The Report to: Joint Legislative Budget Committee Arizona Telecommunications Services was delivered in November 2002. The report looked at the following five options as a means to improve service delivery and increase the fiscal efficiency of Arizona statewide telecommunications services:

- Updating technology to Voice over Internet Protocol/Internet Protocol telephony
- Retaining “As Is” service delivery
- Privatizing the delivery and support of telecommunications services
- Moving to shared services and support of telecommunications services
- Allowing agencies to procure their own telecommunications services

After a thorough review of the options it was recommended that the State pursue either a Shared Service or a Privatized service delivery model. The Privatized model appeared to be the most cost-effective model. The following are among the recommendations in the report:

- Adopt a centralized governance model
- Strongly consider the resources available in the private sector either through an outsource or co-source to improve efficiency, acquire expertise and ease the financial burden
- Create an RFP to privatize all statewide telecommunications with Service Level Agreements

In response to these recommendations, the Arizona Legislature enacted HB2533 that required GITA to deliver for review to the Joint Committee on Capital Review (JCCR) an actionable request for proposal to privatize telecommunications services on or before October 31, 2003. This legislation also identified the following requirements and goals of this action:

- Provide for the telecommunications requirements of all Executive Branch State agencies and branch offices of State agencies regardless of location
- Leverage network equipment already procured by State agencies
- Provide a scalable, centralized statewide, voice, video and data converged solution pursuant to the State’s target architecture
- Provide a solution that will streamline State agency communications and enable other services such as State government N11 abbreviated dialing

#### **1.4 State of Arizona Organizational Structure**

The state government of Arizona is comprised of three branches - the executive, legislative and judicial. Although all three branches provide a variety of services directly to the public, the executive branch serves as the prime executor of legislative and judicial policy and provides most of the services recognized as being associated with State government. The executive branch has over 100 state

agencies, boards and commissions. A list of these organizations and their approximately full time equivalent (FTEs) is included as Attachment P. The executive branch is responsible for providing services internally, including telecommunications to all State agencies.

The following 14 agencies account for 80% of the State's telecommunication spending, in accordance with the JLBC report:

<ul style="list-style-type: none"> <li>• Office of Attorney General (AG)</li> <li>• Arizona Health Care Cost Containment System (AHCCCS)</li> <li>• Dept. of Environmental Quality (DEQ)</li> <li>• Dept. of Economic Security (DES)</li> <li>• Dept. of Health Services (DHS)</li> <li>• Dept. of Administration (DOA) (and its state agency customers)</li> <li>• Dept. of Corrections (DOC)</li> </ul>	<ul style="list-style-type: none"> <li>• Dept. of Revenue (DOR)</li> <li>• Dept. of Transportation (DOT)</li> <li>• Dept. of Public Safety (DPS)</li> <li>• Dept. of Game and Fish (G&amp;F)</li> <li>• Dept. of Juvenile Corrections (JC)</li> <li>• Lottery</li> <li>• Arizona Retirement System (Retirement)</li> </ul>
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**Figure 1 - Selected State of Arizona Agencies**

Inside the executive branch, the Department of Administration is required to provide administrative and logistical services to executive branch and other State agencies. The division of ADOA responsible for meeting the State's technology needs is the Information Services Division (ISD). ISD is one of seven business units functioning under ADOA. ISD provides some computing resources, information technology and telecommunication services to State agencies. ISD services to State agencies include host processing on mainframe, midrange, and file servers as well as voice and data communications services. ISD also oversees the statewide planning and support of the 9-1-1 Emergency Telecommunications program. One of the offices under ISD is ATS. ATS is responsible for managing voice and data services for the State of Arizona.

The ATS organization reports to an Assistant Director, the CIO in the ISD division of ADOA. The Assistant Director and the ATS manager provide leadership and direction for ATS. Subordinate supervisors are responsible for Project Management, Operations, and the Service Center. Additionally, ATS provides switchboard services for the Capital Mall area and the Tucson campus. [Note: The switchboard function will not be assumed by the Contractor.]

The Project Management Group is responsible for:

- Service Analysis - development of service approaches, proposals, Interagency Service Agreements/Service Level Agreements, service support contract development, etc.
- Architecture - engineering analysis and design for voice and data, advanced tier (2/3) technical support, RFP development, and vendor contract compliance.
- Projects - perform project management and oversight of vendor-led projects for the call center and network and telephone systems; tailor and enforce project management approaches; develop and implement project tracking tools and processes; assist Finance and Planning with ATS rates development.

The Operations group is responsible for:

- Network Engineering
  - Web Services - provide and support Web application services, Web mail service, and Domain Name resolution [Note: This function will not be assumed by the Contractor.]
  - Wide Area Network - provide, manage and support data network connectivity to and from agency main offices to remote offices throughout the State; connectivity to the State of Arizona data network (inter-agency); broadband Internet access; Internet Protocol (IP) address management via Dynamic Host Configuration Protocol (DHCP); and remote access solution for agency telecommuters via an Internet Virtual Private Network (VPN) server.
- Voice Engineering
  - Call Center operations - support call center platform including the Nortel 81C, Nortel Enhanced ACD (Symposium), Nortel Open IVR with CTI, Symon, Headliner, Melita Predictive Dialer, and TCS
  - Voice Services - provide and support trunking, call routing, dial tone to agencies on and off the Capital Mall in Phoenix and Tucson.

The Service Center group is responsible for:

- Voice messaging - provide training and support for the Octel system for voice mail, auto attendant, fax on demand and survey.
- Telephone sets - provide training and support programming on single and multi-line telephone sets.
- Answer, route and resolve service requests and help desk calls
- Perform move, add, change and repair activities at all ATS customer locations
- Log and track service requests and help desk calls
- Generate ongoing and as-needed reports



- Maintain inventories of equipment, circuits and services
- Manage customer notification of events such as upcoming planned outages.
- Maintain customer directory database

The Finance and Planning group within ISD provides important support services to ATS and is responsible for:

- Processing carrier and vendor bills for services procured by ATS
- Billing agencies for ATS services
- Validating payment of bills for ATS services
- Contract Administration
- Performing bill audits
- Rate evaluation

## **1.5 State Roadmap and Future Requirements**

In support of the privatization of telecommunication services mandated by 2003 Session Laws, Chapter 0263, HB2533, GITA, with support of its consultant The Burton Group and input from many stakeholders, has developed the Statewide Telecommunications Roadmap (Roadmap).

The Roadmap is a high-level plan for reaching the State of Arizona's goal of a fully converged statewide voice, video and data network to service all state customers. It outlines foundational steps to a cost effective network that is consistent with industry trends and capable of meeting the State's current and future needs. The Roadmap describes the State's goals and recommended strategies but enables an outsourced vendor to identify the best approach to meet the State's needs.

The State's management goals for its telecommunication services are as follows:

1. Obtain cost-effective telecommunication services to control statewide expenditures
2. Meet current and future state customer business needs
3. Improve inter-agency communication
4. Provide better services to communicate with the citizens of Arizona
5. Support cross-agency initiatives (i.e., criminal justice integration, social services reform, 211)
6. Support rural development through availability of telecommunication services

The State's technology related goals are as follows:

1. Improve the quality of voice and data services
2. Centralize provision of telecommunication services to eliminate redundancy and reduce agency silos
3. Develop a statewide infrastructure that supports convergence of voice, video, and data to realize the benefits of convergence
4. Support movement to IP telephony, as appropriate based on business needs, to take advantage of new IP services and applications
5. Update statewide technical standards to enable seamless communication
6. Secure the State's networks to protect data and technology assets

By anticipating the outsourcing of the State's telecommunication services, the State legislature has created a cornerstone for the Roadmap. The Roadmap contains business and technology-related milestones as well as a schedule to move state agencies to the outsourced environment. Based on considerable stakeholder feedback, all state agency voice and wide area network data services will be transitioned to the outsourced environment in the first two years. An analysis will be conducted prior to agency transition to identify needed infrastructure changes, support and management requirements, and opportunities for cost savings (by the agency and the State as a whole).

The State also desires to move to a single converged voice and data network from separate networks within 3 to 5 years. In year 1, the State must determine the best strategy for obtaining convergence based on a detailed plan presented by the successful outsourced service provider (Contractor).

The State is also interested in enabling movement to IP telephony for agencies who present a business case for this change. According to the Burton Group, less than 5% of large enterprises have moved to IP telephony for their entire organization. However, industry experts agree that movement to IP is the future direction of communications and is cost justified in particular cases now. A copy of the Roadmap is provided in Attachment A.

## **1.6 Current Environment**

While the RFP identifies the broad scope of telecommunications requirements for the State of Arizona in the future, the State requires the Contractor to assume management and operations of all State-owned assets managed by ATS and provide the same services to all existing ATS customers currently served by the ATS organization. The following sections shall identify the existing telecommunications environment operated by ATS as well as define specific requirements for the RFP.

Based on earlier State legislation, ATS is authorized to charge State agencies for telecommunications services. ATS provides some services to approximately 30 percent of the State's 42,000 employees. One hundred and seven State agencies (from the executive, judicial and legislative branch) and several political subdivisions are purchasing one or more services from ATS. Many of the agencies are purchasing services from ATS for just some or one of their locations. A detailed breakdown of these agencies and services is listed in Attachment B.

A current list of all executive branch agencies (including full time equivalent personnel) is included as Attachment P. In comparing Attachment B to Attachment P you will note that there are about a dozen governmental ATS customers who are not executive branch agencies. These non-executive branch agency ATS customers include members of the judicial branch (i.e., Supreme Court), legislative branch (i.e., Auditor General), political subdivisions (i.e., cities, counties, etc.) and others (i.e., Yavapai County). A list of other government organizations eligible to participate (at their discretion) in this Contract, who are currently members of the State's buying cooperative, is located at: <http://sporas.ad.state.az.us/coop/coop2.asp>. Additional cities, counties and political subdivisions may join the State's buying cooperative during the term of this Contract.

**The Governor has mandated that all ATS customers remain under services provided by the privatization contract.** Executive branch agencies not using ATS services are either providing their own and/or procuring them directly from vendors using statewide telecommunications contracts. **The Governor has mandated that executive branch agencies (not currently ATS customers) will receive their telecommunications services from the Contractor on the earlier of the timing outlined in the Roadmap or as they require major new services (see Attachment K).**

The State relies on several backbone transport mechanisms as well as related systems to meet its telecommunications needs. Many of these systems and related components are interconnected and are not easily separated. For descriptive purposes, however, these systems have been organized into two primary categories; voice services and wide area network (WAN) services.

#### 1.6.1 Voice Services currently managed by ATS

ATS has approximately 14,000 telephone subscriber lines located in the Capital Mall Governmental Complex in Phoenix and in the Tucson Governmental Complex. One hundred and seven State agencies are purchasing one or more services from ATS. A detailed breakdown of these agencies and services is listed in Attachment B.

The Capital Mall in Phoenix and the State complex in Tucson have State-owned conduits and fiber optic cabling and copper cabling throughout each facility. The Capital Mall and the Tucson complex are tied together by a redundant inter-LATA (Local Access and Transport Area) high-speed OC-3 service with 38 PRI trunks leased through Qwest. Additional leased circuits provide voice and data communications out to many agency field offices throughout the State. An OC-24 is provided through Qwest, an OC-48 through Cox and an OC-48 through AT&T. Attachment F contains a detailed listing of ATS-operated circuits.

ATS provides Capital Mall telephony services via Nortel MSL-100 and Option 81C telephone systems. Maintenance is provided through a yearly renewable contract. Three distributed fiber-interconnected on-Mall fault tolerant remote switches complement the system. In total, the system serves approximately 14,000 subscriber lines. All ATS telephony services provided through the Nortel MSL-100 is TDM (Time Division Multiplexed) based using copper cable from the MSL-100 or its remote switches to the customer handset. The MSL-100 has been IP-enabled to allow telephone communications transported over the data network. Voice diagrams are located in Attachment C. The following table displays information regarding switch services:

Site	Architecture	No. Licensed Ports	No. Stations
Phoenix	Meridian 1 SL100	2,990	12,327
Phoenix	Meridian 1 Option 81C	1,355	3,000
Tucson	Meridian 1 Option 81C	712	2,000

**Figure 2 - Switch Location and Number of Ports and Stations  
(current as of 09/15/03)**

The MSL-100 and the 81C are located in the Data Center and have sufficient battery backup for 40 hours. The Data Center also has a backup power provided by a generator.

ATS also provides telephony services to the Tucson complex using a Nortel Option 81C switch. This system supports approximately 1,200 subscriber lines. There is also an Option 11C in Tucson providing services to the Arizona School for the Deaf and Blind. The 11C supports 110 analog sets and 248 digital sets for a total of 358 users. PRI lines tie the 11C to the 81C in Tucson. The 11C does not support voice mail. These services are provided by the Octel 250 in Tucson.

Below is a breakdown of local and long distance telephone traffic generated on the ATS-managed voice network.

Location	Local Annual Usage in Minutes
Phoenix	103,762,707
Tucson	5,306,752

**Figure 3 - Local Telephone Traffic by Location**

Location	Long Distance Minutes
Phoenix	9,614,837.60
Tucson	618,583.20
Sub-Total	10,233,420.80

**Figure 4 - Annual Long Distance Minutes**

Intrastate long distance is approximately 83% of all long distance calls. Inter-state long distance calls are approximately 17% of all long distance calls.

ATS manages 3 Octel voice mail systems. There are 2 Octel 350s in Phoenix and 1 Octel 250 in Tucson. There is a plan to move the Tucson users off the Octel 250 and onto one of the Octel 350s in Phoenix through their trunked line.

ATS provides centralized Call Center functionality using Nortel's Symposium Call Center Server to multiple divisions in State agencies and is responsible for:

- Direct customer communications
- Attending weekly or bi-monthly meetings
- Interfacing with and managing vendors
- Troubleshooting with WAN engineers
- Writing scripts for Symposium
- Providing phone programming – moves, adds and changes

The ATS managed Call Center, using Nortel's Symposium product, has 850 users programmed into the system. Normally there are about 350-400 simultaneous users on the system. There are 75 scripts currently running on the Symposium system.

ATS operates a Periphonics Interactive Voice Response system. This runs on a Solaris operating system on 3 servers. The system is using 216 ports with 5 VPS modules, each module able to handle 48 ports.

ATS also operates a Melita predictive dialer for the Department of Revenue. A predictive dialer is a telephone control system that automatically calls a list of telephone numbers in sequence and screens out no-answers, busy signals, answering machines, and disconnected numbers while predicting at what point a human caller will be able to handle the next call.

There are 24 agent licenses on the Melita. The Melita is connected to the Option 81C via 5 line-side T1s. The call volume is approximately 2,000 calls per month.

ATS provides services to operate and maintain wallboards. Wallboards are used to provide call data (queue count, wait time, etc.) over the wallboard for agents and supervisors. Facilities can also send messages out over the boards to the agents. There are currently a total of twelve wallboards distributed across four locations. All twelve of these boards have been in service for over 5 years. Seven of the wallboards were purchased by the customers, and ATS supplies only the maintenance and application support. All in-service wallboards are: 2-line, 2" characters, displaying 3-colors, manufactured by Symon.

The program application is Symon, currently at release 7.0. The client version of Symon is loaded at three locations. Current server and software has just been upgraded. ATS has no upgrade plans for the near future.

A detailed ATS hardware inventory is included as Attachment E and a list of ATS maintenance contracts are included as Attachment I.

Slightly less than 400 calling cards have been issued to ATS-serviced State employees. Use of these cards is discouraged and employee use has decreased over the years.

ATS provides support to approximately 900 voice service moves adds and changes per month. This has been as high as 2000 in one month when moving large agencies to the Mall.

Audio conference requests average 1,000 – 1,100 per month with about 900-950 completed conference calls per month.

Voice operations personnel are located in the Service Center on the Capital Mall. There are currently 15 FTEs associated with voice operations in the Service Center.

- 1 billing person \*
- 4 field technicians
- 4 analysts

- 2 programmers \*
- 1 supervisor
- 1 manager \*
- 1 voice mail administrator
- 1 administrative assistant \*

\* Help Desk calls are sent to these individuals

The individual responsible for Billing provides the following services:

- Sets up accounts
- Bills customers for services

Field Technicians do outside installation and repair.

Analysts identify requirements and develop voice solutions for customers. They are the primary contact with customers and provide the following services:

- Provide end system design including type of phone service, decide who picks up what incoming calls, dial setup, roll over design
- Involved in meeting agency business requirements and advises agencies how best to meet their voice requirements
- Write up service orders

Programmers are responsible for processing orders. To accomplish this they:

- Assign switch equipment
- Assign cable pairs
- Make system ready for installation
- Program lines
- Pass off service order to installers

The Voice Mail Administrator is responsible for the following tasks:

- Sets up all voice mail accounts
- Administers voice mail system (Octel)
- Setup accounts and bill customers
- Provide user training on voice mail system

The Administrative Assistant is responsible for:

- Providing assistance at the Help Desk
- Creating trouble tickets using Remedy

In addition to the individuals in the Service Center there are also 3 FTEs associated with switch management in ATS.

- 1 for the MSL 100 in Phoenix
- 1 for the Option 81C in Phoenix
- 1 in located in Tucson to support the Option 81C and 11C

ATS operates a Help Desk for customers. Normal hours of operation of the Help Desk are from 6 am to 5 pm Monday through Friday. After hours support has been provided by a fee arrangement with the mainframe Help Desk. Since this Help Desk is data centric, they provide no assistance for voice related problems. Their only recourse is to try to contact a member of the voice team through page or telephone. The Contractor shall not continue with this arrangement. ATS provides no on-call services, although they may be reached in an emergency.

The Department of Revenue's (DOR) telephone services recently implemented IP Telephony at their Capitol Mall, Tucson Mall, and East valley locations. ATS provides the 2000 number block, connectivity to the public switched telephone network (PSTN), 5 digit dialing, and E911. Two call managers are located at the ATS facility. One call manager and the servers for Music on Hold and Messaging are located at the DOR location. DOR handles all of their own moves adds and changes.

#### 1.6.2 Wide Area Network Services currently managed by ATS

The shared data network provided by ATS is called MAGNET (Multi-Agency Network). MAGNET is a Cisco-based Fiber Distributed Data Interface (FDDI) network connecting 29 buildings on the Capital Mall and the two buildings in the Tucson complex. The network provides customers with high-speed data connectivity as well as Internet access.

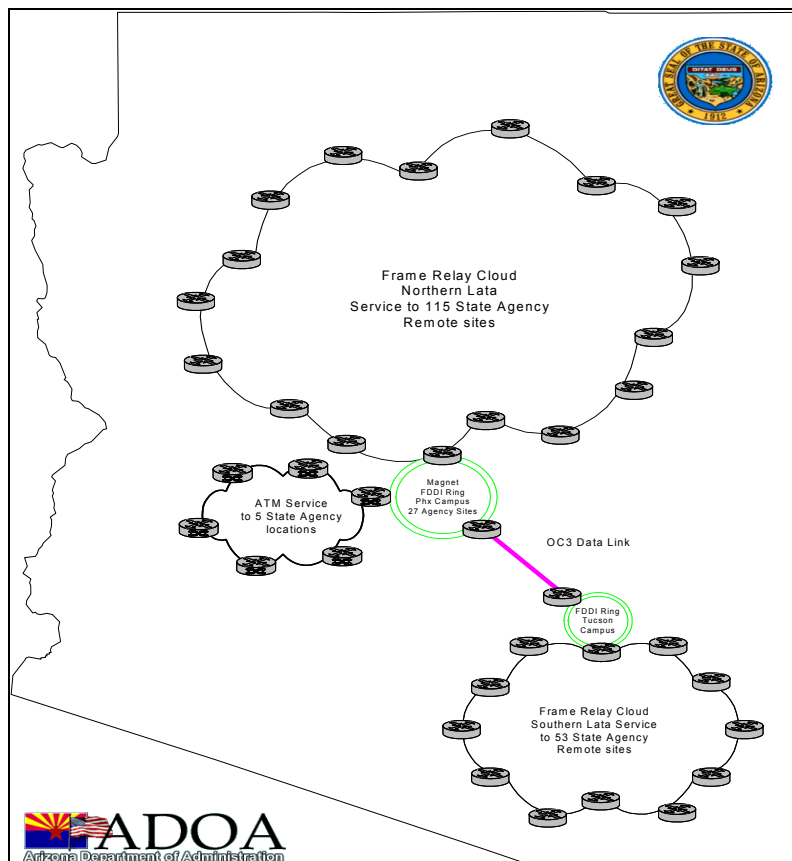
The State is gradually upgrading the backbone to Gigabit Ethernet. The current FDDI backbone is expected to remain in place, however, even after the migration is complete.

ATS also operates and maintains a multi-protocol backbone WAN connecting a number of agency sites geographically dispersed around the State. These connections are made via dedicated leased lines to the backbone hubs in Phoenix and Tucson. About 120 sites connect to the Phoenix hub via Frame Relay with another 5 sites connecting via ATM service. Another 52 sites connect to the hub in Tucson via Frame Relay. The two hubs are connected by four OC-3/DS3 links the Frame Relay links connect at speeds ranging from 56k to T-1. An OC-3 connects the Phoenix and Tucson hubs. The number of WAN connections totals 267:

- 56k - 35
- Frame T1 or less - 156
- DS3 - 4
- Point-to-Point - 72

The following drawing depicts the ATS WAN topology:





**Figure 5 - ATS WAN Diagram**

Internet connectivity is provided by Global Crossing via a DS-3 connection at a rate of 21 Mbps with a burst rate up to 45 Mbps. ATS is currently working to provide a second Internet connection for both additional capacity as well as redundancy. This connection will be provided by Cox at a rate of 21 Mbps with no burst capability. Both connections terminate in the Data Center. Approximately 80 agencies access the Internet through ATS-provided services. Not all State agencies access the Internet through the ATS-managed service. Some, like Department of Economic Security (DES) and Game and Fish, provide their own Internet access. There is a concern that these other Internet connections could become a security issue unless centralized management and control is exercised.

ATS provides remote dial-up services as well as Internet access to the State network via VPN client software to about 968 users. ATS also provides about 200 moves, adds and changes associated with the receipt of 400 tickets per month in wide area network services. ADOA owns a full Class B address.

Individuals in ATS associated with WAN management are responsible for:

- All Frame Relay and other data transport technologies
- Maintaining routers, switches, hubs and port interfaces
- Operating the Network Operations Center (NOC)
  - Use OpenView, CiscoWorks and Concord management platforms
  - Operate Sniffer as required
  - Operate 6 am to 6 pm Monday through Friday
  - Use Mainframe Help Desk for after hours support
- Operating and maintaining PIX firewalls
- Operating and maintaining RADIUS and VPN tunnel termination devices
- Managing Nortel Contivity platform for remote access
- Identifying customer requirements
- Designing, configuring and implementing network design
- Developing equipment specifications
- Ordering circuits
- Troubleshooting problems, of which 2/3 are not specifically related to ATS network but are customer related
- Interfacing with vendors
- Supporting Call Center
- Documenting and maintaining hardware and software inventory
- Performing backups at the NOC
- Exploring new technology
- Performance metric attainment reporting and auditing

At present, ATS manages only the WAN infrastructure. Each individual agency is responsible for managing their internal cabling and LAN infrastructure. Not all equipment on the WAN is owned by ATS. Some equipment is owned by individual agencies as well. As an example, ATS placed a blade in a Health Services Cisco 6500 for WAN connectivity. ATS manages the WAN link but Health Services manages the switch.

### **1.6.3 Arizona Healthcare Cost Containment System (AHCCCS)**

The majority of AHCCCS telecommunications are currently managed internally, while obtaining minor support from ATS. Management and operation of the AHCCCS voice and data networks shall be the responsibility of the Contractor.

The AHCCCS voice communications complex is a networked architecture of integrated products and services, including some from ADOA, using technologies from Nortel and Siemens. Together, these elements deliver a transparent 5-digit dialing access to the entire AHCCCS agency (18 sites) and the Capitol Mall, voice mail, automatic call distributor (ACD), and integrated voice response (IVR). The IVR and ACD features are critical facets used to serve our

clients and providers. IVR is used by providers and health plans for member eligibility verification. There are seven Call Centers, Communication Center, Provider Assistance, Prior Authorization, KidsCare, SSI/MAO, ALTCS Technical Service Center, and ISD Customer Support, which use the ACD feature enabling incoming calls to be answered in the order of receipt.

A network map of the existing AHCCCS communications system is in Attachment Q. Also included in Attachment Q is a network diagram of the proposed system, voice phone charges, and a station count.

The core product and main hub of this system, which is located at the Central Office, and the systems at three other metro-Phoenix offices, were brought into service in 1995.

Due to the increased voice requirements and the age of the existing voice system, AHCCCS is in the process of replacing the PBX-based system with an Internet Protocol Telephony system. The following is a brief description of the migration plan:

- A distributed IPT system will be installed in the four offices, Glendale, Mesa, Tanner and central.
- Additional firewalls will be installed between Central Office and ADOA, Glendale and ADOA, and Glendale and the Internet, further protecting the agency from the outside.
- The primary call manager will be placed in Central Office, which will manage the calls for the four offices. A second call manager will be placed in Glendale as a business continuity planning measure. This second call manager will be put into operation to enable calls for the Tanner and Mesa offices to be handled in case of a service outage in Central Office.
- Each of these offices will have a separate local number for 911 emergency compliance.
- All of the telephones in the offices will be replaced.
- The IVR and the ACD applications will be converted to the new system.
- The voice-only lines will be migrated to converged data and voice lines. In the future, they plan to upgrade the bandwidth between Central Office and Glendale so that the redundant IVR and ACDs can be ready for operation in a recovery situation.

- Additional UPS will be added to each wiring closet to cover up to a two-hour power outage.
- Existing State contracts will be used to purchase the necessary equipment and services.
- Both the data and voice staff will be trained on convergence, security, IVR and Call Centers. All staff will be trained to use the new equipment as it applies to their positions.
- The implementation plan contains a phase-in approach where both the old and the new systems are running concurrently with a gradual cutover floor by floor and suite by suite.
- The hardware migration implementation is not in scope to this RFP. Should the IP Telephony conversion take place at AHCCCS, the Contractor shall be responsible for management and operation of the telephony systems including the new IP Telephony. Should the migration not take place, the Contractor shall be responsible for operating and maintaining the existing telephony systems.

#### **1.6.4 Other Voice and Wide Area Network Services**

Additional agencies will be folded into the outsourced environment as called for in the Roadmap (within the first 2 years) or as they have a need for new or improved telecommunication services, whichever occurs first. The Contractor will propose whether to manage all voice traffic from a single switch (including or excluding VOIP services), retain one or more additional switches, or proposed new technology, all subject to oversight by the State. For the State to continue to migrate additional agencies/locations to the outsourced environment, the Contractor must continue to meet its performance obligations under the Contract.

A current list of the executive branch agencies (including full time equivalent personnel) is included as Attachment P. A list of other government organizations who are members of the State's buying cooperative and eligible to participate (at their discretion) in this Contract is located at: <http://sporas.ad.state.az.us/coop/coop2.asp>.

A list of the PBX systems and key systems utilized by executive branch agencies (as of November 2002) are included as Attachments N and O, respectively. Information regarding hardware inventory and circuit information regarding

these agencies will be provided at the time the agency is to be migrated to management by the Contractor. Information regarding the telecommunication needs of other non-executive branch agency state customers is not available in any detail at this time. Historically, there has been significant usage of statewide carrier service and other telecommunication related contracts by these organizations; however, no projection can be made regarding their interest in participating in this Contract.

## **1.7 General Requirements**

### **1.7.1 Retained Authorities**

The State shall retain a set of core technology management functions, including strategic and operational planning and management, local area network operations and management, technology retooling approval, business process reengineering, contract management and budgeting. The Contractor must propose how it will work with the State in light of these retained authorities.

The State will retain authority over specific functions, as follows:

**Strategic and Operational Planning and Management** – the State will take primary responsibility for strategic planning with assistance from the Contractor. The Contractor shall assist in the:

- development of goals and objectives
- assessment of the current environment
- analysis of alternatives
- development of recommended directions and solutions
- development of technology standards
- development of implementation plans; and other related areas as appropriate

The State shall also retain primary responsibility and authority (with assistance from the Contractor) over approval of initiatives that affect the Contractor's scope of services as described in this Contract, and strategic directions of the State's technology environment. This includes the coordination of review (departmental issues) or approval (in the case of statewide infrastructure issues) of requests for service beyond the services enabled by this Contract or that directly modify the Service Level Agreements (SLAs) or other requirements of this Contract.

For the purpose of oversight of the Contract the State of Arizona will have a Program Office. The Program Office shall provide a principle point of contact for the Contractor and provide program management, engineering, financial, contracting, and administrative functions with the following responsibilities:

- **Program Management** – A program manager should be assigned with overall responsibility to ensure the goals and requirements for the State’s telecommunications requirements are met by the Contractor providing these services. The management function would track Contractor performance requirements and Service Level Agreements and monitor technical compliance. This office would provide coordination functions on major issues effecting all State agencies and the Contractor. Routine service matters can be handled by the State agencies while major issues shall be handled by the Program Office. An important function as part of this interface with State agencies is reviewing customer satisfaction surveys submitted by the Contractor. This mechanism provides valuable feedback on the quality of services provided by the Contractor. The results should be discussed with the Contractor as part of a regular process improvement program. Another task this office provides is the regular review of the program with the Contractor. This would include both face-to-face meetings as well as the regular review of all Contractor reports. Since it is anticipated that most telecommunications assets will remain under State ownership, management must ensure new equipment owned by the State is properly registered and under current maintenance or warranty. State agencies shall be responsible for managing equipment they own. The Program Office shall provide periodic status reports regarding the State of Arizona telecommunications services and Contractor performance to ITAC.
- **Engineering** – The State should have capable engineers to support the technical oversight requirement of the program office and to review the technical performance of the Contractor. To support this requirement the program office will require an engineer(s) proficient in voice and data services. As new tasks are defined, through the additional work order process, engineering would provide a technical review of the Contractor’s proposals to determine that the technical requirements of the State are being met. Since engineering would have a good technical understanding of the State’s existing network structure, engineering would be in the best position to ensure that any Contractor proposals will not only be technically sufficient, but also be able to identify areas where system resources could be more fully exploited to realize cost savings as new customers are added to the service. Engineering should also be used to monitor SLAs and other technical compliance as well as recommend technical areas of improvement. Engineering will also provide technical reviews and provide recommendations on Contractor submitted initiatives for cost reduction proposals to ensure the technical requirements of the State shall be met while reducing costs. Engineering

must also monitor compliance with State security requirements and adherence to the State's Enterprise Architecture.

- **Financial** – The financial function is responsible for fiscal management of the Contract as well as to review the additional work order proposals from a cost standpoint. Since the Contract will be funded from direct customer billing, it will be important to monitor and report on the rates charged State agencies for telecommunications services and provide a comparison of similar costs to commercial customers. While the Contractor will implement and manage the billing and payment system, it is important for the State to take an active role in the audit process to provide fair and reasonable rates. While the engineering team evaluates Contractor proposals from a technical perspective, the financial team will be review proposals from a cost perspective. Together, their recommendations provide a negotiation basis for the State Procurement Office (SPO).
- **Contracting/Procurement** – SPO will assign a person either full or part time to the Program Office or delegate responsibility to an individual in the Program Office. Procurement will identify a point of contact responsible for this Contract. Procurement will be responsible for all contract issues related to this Contract, including SLA enforcement and contract provisions. Procurement will be responsible for official communication between the State and Contractor relative to contractual issues. Contracting would also be responsible for negotiating all contract modifications under the additional work process. Procurement would also work with the Contractor in regard to its relationship with other State telecommunications and related contracts.

**Local Area Network Operations and Management** – some individual State agencies will continue to be responsible for managing and operating their own local area networks (LANs). Others will rely on the Contractor to support these requirements, especially as they migrate to IP telephony when traffic will have to be managed end to end. Agencies with internal LAN administrators will continue to provide support to users from the WAN point-of-presence to the desktop. The Contractor shall work closely with LAN administrative staff to resolve WAN/LAN configuration issues and to resolve related system performance issues.

**Technology Retooling Approval** – the State retains the right to accept or reject any Contractor proposed technology update plan that significantly changes the State's service system infrastructure. It is expected that the State and the Contractor will work closely together in the evaluation of new technologies and

the development of any plans to upgrade or update the State's telecommunications systems. Nevertheless, the State reserves the right to prohibit the use of any technology that the State deems not in the State's best interests.

**Business Process Reengineering** – it is possible that the Contractor may propose, initiate, and conduct technology changes that result in the need for business process reengineering efforts at the State. The State will retain primary responsibility and authority over: approving these efforts; coordinating/resolving labor-related issues; and ensuring that performance metrics (including before and after) are accurately and appropriately developed.

**Budgeting** – State agencies will be responsible for the annual or biannual budget for their telecommunications operations. The Contractor is expected to provide estimates, as necessary to enable the State to properly budget for its services. (See Section \_\_\_\_ for details)

- a. Do you have any concerns regarding the State's retained authorities?
- b. Explain your organization's experience in providing Strategic Planning assistance to customers, with organizations similar to the State.
- c. Describe how your organization will assist State agencies with estimating, for the State's review, approval, and budgeting, your anticipated fees for services to be rendered?

#### 1.7.2 Technology Refresh

The State seeks a Contractor that will provide a plan to keep the State's telecommunications (voice and data) infrastructure, systems, and applications current with industry advances. **The Contractor's proposal must include a plan for keeping the State's technology base and infrastructure current with leading technology. The proposal shall also include all associated costs, for three years. In addition, the Contractor must provide a report of hardware and software status within 90 days of contract commencement.**

The State shall review the plan submitted by the Contractor and approve the funding level each year prior to the Contractor assessing fees against the rate structure to be paid by State Agencies for services. This review shall be conducted annually by the Contractor to allow the State to approve expenditures on an annual basis and to approve the rate structure to fund the technology refresh plan. The Contractor shall prepare a report annually documenting all expenditures allocated to this program including assets purchased, amount paid per item documenting all savings off list price and location of item. The Contractor must acquire the products at the lowest possible discount. The report format shall be determined by the Program Office.



In the event the Contractor discovers hardware or software is not up to current levels the Contractor shall report to the State the particulars and recommend a remediation strategy. **The Contractor shall determine whether or not hardware and software will be kept at levels supportable by manufacturers and which equipment will be replaced or upgraded as required to meet agreed Service Level Agreements (SLAs) and other requirements of this Contract.**

The State does not require specific refresh cycles relating to WAN, or telecommunications devices, but does require the Contractor to meet on-going functional and performance requirements (including in accordance with the agreed SLAs), which could lead to the refresh of the involved equipment. Additionally, as hardware and software upgrades and maintenance are available from their respective vendors, or requirements are identified for cable, the Contractor is to notify the State and coordinate implementation of the upgrades and maintenance. The Contractor is responsible for identifying the maintenance requirements of hardware and software to keep them at the manufacturers' current levels and releases and report to the State the status.

- a. Will you meet these requirements? Y\_\_\_\_\_ N\_\_\_\_\_
- b. Describe how you will implement infrastructure upgrades to assure the State that its telecommunications infrastructure, systems, and service will be kept to levels required to meet SLA agreements and other requirements of the Contract while ensuring the most cost-effective approach.

### 1.7.3 Change Management

The State's telecommunications and IT systems, operations, and infrastructure must constantly evolve and adapt to the State's changing environment in order to continually improve the delivery of services to the State's departments and citizens. The State seeks a Contractor that will implement methodologies to accommodate such changes including changes in services, scope of services, service levels, service volumes, and application and system requirements. The State also requires the Contractor to provide training, as needed, for end-users as changes to the environment and systems affect their daily operations. The State does not expect this task to involve much effort, since training envisioned consists mainly of acquainting users on the use of telephone features and functions. This would also apply as new phones are provided during the course of the migration to IP telephony. On-line training could facilitate some of these requirements. The Contractor shall maintain and administer Change Management processes and to communicate, assess, monitor, and control all changes to system resources and processes including billing and payables. The Contractor shall manage changes so that a stable communications environment is maintained during all change activities.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe the methodologies and mechanisms that your organization proposes to implement and manage the State's evolving and changing requirements during the course of your organization's relationship with the State. Include your approach to training of the State's employees as the environment and systems evolve and change.
- c. Due to the potential impact to operations, the State is interested in identifying methodologies or structures that facilitate the proactive management of change. Describe your approach. Please also describe how your approach facilitates cooperative handling (with the State) of change management issues.

#### 1.7.4 Assets and Facilities

The State perceives value in retaining ownership of the existing technology assets covered by this Contract. Such assets are principally composed of the following: telecommunications hardware used for both voice and data switching including key equipment, PBX, and WAN-related switches, hubs, routers, desktop telephone sets and other hardware; other similar significant telecommunications assets; and the rights to use certain proprietary software. In addition, certain telecommunications assets that are integral components of physical structures (e.g., network wiring) shall also be retained by the State. The State's requires the Contractor to consider use of existing State-owned assets, unless it can recommend alternatives that will save the State money without requiring significant up-front investments. Any new purchases, leases or upgrades of capabilities will be obtained on behalf of the State.

The Contractor is to continue, update and maintain the existing inventory for the State, provide State access to the inventory, with the Contractor determining what telecommunications resources are needed to satisfy the State's requirements and service levels, and maintain an accurate inventory of telecommunications resources and assets and tag those items with State property stickers.

The State shall provide facilities, including water and electricity and basic office furnishings, for Contractor employees. The Contractor shall be given the same amount of space currently assigned to State employees responsible for voice and WAN services identified in this RFP. Any other space requirements, equipment or furnishings such as PCs, supplies, phone service, Internet access and similar items for use by the Contractor's personnel on-site are the exclusive responsibility of the Contractor.

Access to State buildings is regulated. Therefore, all Contractor personnel are subject to State security requirements and will be issued badges.

*Statewide Standard P800-S890, Personnel Security*, establishes security practices and procedures and new and existing employees as well as outside contractors. The Contractor shall adhere to this policy standard. In addition, Contractor personnel shall be subject to background checks as a condition for working with State IT systems.

- a. Will you meet these requirements? Y\_\_\_\_\_ N\_\_\_\_\_
- b. Describe any issues that your organization anticipates managing State assets. Explain your proposed approach for resolving such issues.
- c. Describe your approach to implementing infrastructure upgrades in year 1 and beyond.
- d. Describe your organization's approach for keeping accurate and current records of all physical and logical assets, asset locations, end-user information, and other information related to the services that your organization will provide (including communications equipment, mobile devices, wiring cabinets, pagers, and telephones). Describe in detail your organization's asset-management systems and procedures, and how the State will be able to access such systems.

#### 1.7.5 Resource Planning, Services and Asset Acquisition

As part of the normal management process the Contractor shall develop a plan to manage resources to meet State telecommunications requirements. The Contractor shall procure all technological resources required to perform its service obligations and (subject to such fee adjustments as might be agreed upon by the parties) the Contractor shall also make procurements of additional resources (i.e., resources for use by departments) as the State might request, at the lowest available prices.

The State shall maintain and continue to update a portfolio of statewide telecommunications "commodity" contracts to ensure continuous competition and reduced prices on carrier services and telecommunication hardware, software and services. The relationship of the Contractor to the commodity contractors will be as follows:

Carrier Services - The Contractor will handle all interactions with the carrier services contractors (except contract interpretation/modifications) on behalf of the State. Managing payments and services under these contracts will allow the Contractor to identify opportunities for consolidation and cost savings across all

agencies. The Contractor will bill the agencies and maintain a payment system for payments to the carriers.

Hardware and Software - The Contractor will recommend and approve purchases of agency- specific telecommunication hardware and software, subject to signing of purchase orders by individual agencies. The affected agency will be billed by the commodity vendor (not the Contractor) and will own the underlying commodities. The Contractor will manage installation and operation of the commodities.

Maintenance of Statewide Assets - The existing maintenance contracts for statewide assets will be utilized by the Contractor. The Contractor shall also be responsible for payment of maintenance contracts they award once existing contracts expire.

If the Contractor can provide equivalent products or services to those otherwise available to the State, at reduced prices, it may seek approval from the State to provide such products or services.

The Contractor is not bound by the same procurement regulations that govern State purchases. The Contractor, will however, be required to receive State approval of prospective vendors prior to procuring assets as well as approval of the Contractors procurement practices. The State does not expect to exercise the right of rejection as a matter of policy, but rather reserves the right to reject purchases from vendors as appropriate in the best interests of the State. Procurement activities will include: procurement of additional assets; negotiation of lowest prices; obtaining the most favorable rates and discounts available; distribution and installation of all procured items; and software license compliance. Procurement activities shall be performed by, and paid for by, the Contractor. As required, the Contractor shall be bound by State regulations as they purchase off State contracts and will be required to sign legal documents designating the Contractor as an agent of the State.

- a. Will you meet these requirements? Y\_\_\_\_\_ N\_\_\_\_\_
- b. Describe existing relationships that your organization has with suppliers of IT and telecommunications resources and assets. Does your organization intend to use any of these relationships in the procurement function for the State? If so, name the suppliers that you intend to use.
- c. Describe your approach to ensure that all assets it procures for the State are procured in the most cost-effective manner possible and to ensure an open and competitive environment.

### 1.7.6 Reporting and Communication

The Contractor is to assemble and create regular reports on the performance of in-scope functions, in order to assist in the effective management of the Service Agreement, and enable continuous improvement of the in-scope services that the State receives. The frequency of reports shall be determined after contract award. Reports, including billing reports, must be compiled and distributed to the State's management in an agreed upon electronic format. Reports must be compiled and published on all functions, including performance, SLAs, cost management, and subcontractor relationships on a Statewide and department-level basis. These reports must include the measurement of the Contractor's actual performance against the required service levels. The State requires the Contractor to accommodate State management's decisions on reporting formats, content, and frequency. The Contractor is to implement a management structure to facilitate communications between the Contractor and the State and, to address and resolve concerns escalated either by the Contractor or the State. Routine meetings and reporting processes must be defined to ensure a smooth interface and timely resolution of issues.

The State's Program Office and the State Procurement Office will administer the State's relationship with the Contractor and exercise the State's retained authorities. The State will define interfaces as appropriate, such that State single points of contact are defined for each service obtained from the Contractor. The State requires a single interface to coordinate the delivery of all services from the Contractor. The State will not resolve issues or disputes between Contractor's personnel and any subcontractors retained by the Contractor. For operational services such as problem resolution, help desk inquiries and the like, there must be routine and continuous interaction between the Contractor's employees and the State's end-user community. The Contractor's employees are, in fact, extensions of the State's telecommunications organization, and will be a significant interface between such organization and the State's end-user community. This operational interface will determine the satisfaction of the State's employees with the services delivered by the Contractor. The Contractor shall continuously measure and improve its service delivery and the State's employee satisfaction with those services. The Contractor will be responsible for managing all internal contracts and relationships with their subcontractors.

Although the State fully expects the Contractor to assign only its highest quality and most experienced personnel to manage their responsibilities through the course of this partnering project, the State is concerned about the potential consequences should the Contractor's Program Manager or members of the Account Team prove to be ill-suited to meet the demands of the project. **Therefore, the State reserves the right of approval regarding the hiring or transferring of key Contractor management personnel.**

- a. Will you meet these requirements? Y\_\_\_\_\_ N\_\_\_\_\_
- b. Describe the telecommunications management reports you plan to provide the State, including the frequency with which they will be provided.
- c. Describe the management structure your organization intends to put in place for managing its relationship with the State. Describe the background and qualifications of the key personnel who will be assigned to this project. Indicate the period of time over which your organization will commit to keep your initial key personnel in place, rather than re-assigning them to other clients' projects. Describe, in general qualitative terms, how the compensation of key Contractor personnel will be modified to ensure that their personal and professional goals align well with the goals and needs of the State (e.g. performance bonus based on customer satisfaction, etc.).
- d. Does your organization have suggestions regarding the internal structure that the State intends to put in place, as defined in the Retained Authorities section, to interface with your organization? If so, describe in detail your recommended structure for the State to follow during the transition period and throughout the remainder of the services period.
- e. Describe how your organization monitors its performance of services. Does your organization use customer and end-user surveys? If so, describe your process for distributing, analyzing and reporting progress for the customer satisfaction process. How often are surveys conducted, and how does your organization address issues raised by such surveys? Provide examples of your organization's end-user surveys.

## **1.8 Voice Services**

The State, over time, requires a fully converged, integrated voice system supporting standardized user operations and capabilities. The system should be flexible enough to meet the unique requirements of the different State agencies and departments. The system should also support the current numbering/dialing plan and enhanced voice applications such as Automated Call Distribution (ACD) with specialized or custom report management capabilities, Integrated Voice Response (IVR), Computer Telephony Integration (CTI), audio teleconferencing and call center applications, as well as statewide integrated voice mail. This system should evolve into an integrated converged statewide voice, video, and data WAN.

The current system managed by ATS is a voice-switching infrastructure that is stable and robust but constrained in terms of its ability to meet requirements for expansion of current services and for accommodation of new services such as IP Telephony, as detailed in the Roadmap. The State is concerned that the current

system, though adequate for today's needs, will not meet the State's future needs. Additional information is detailed in the Convergence Plan called for in section 1.15. The State requires the Contractor to provide services utilizing a service system that will support both the State's current and future voice communications needs including support for E911.

The Contractor shall describe, in detail, appropriate modifications to the present system to support future State needs. Or, if the Contractor recommends transfer of services to either a different existing system or to a newly designed system, the Contractor shall provide a migration plan as identified in section 1.15, consistent with the Roadmap, from the current system. The State requires a high-quality (near zero call set-up time and noise levels) local telephone service at the most competitive and economically favorable rates throughout the life of the Contract on a continuous basis. Services requiring an access code to be dialed should be initiated within the system and be transparent to the customer.

If the current system is retained for a period of time, then the State also requires the Contractor to enhance the existing system by adding features such as a statewide 5-digit dialing plan and implement a fully integrated voice mail system for the entire State. The State requires a voice mail system that will provide uniform and standardized operations to all State employees. This system would support voice menus, auto attendant, fax-on-demand, broadcast message, voice forms, time-of-day controls, individual boxes per user, remote accessibility, call forward anywhere, Statewide message distribution capabilities, and other features, as required by the State.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe your organization's approach and solution. Include descriptions of alternatives and a description of State roles and responsibilities.
- c. Describe how the system would provide both basic telephony operations to all State employees and provide advanced features and applications to those users requiring them.
- d. Describe the life cycle of the current system and identify any upgrade requirements that will be necessary for it to remain current.

#### 1.8.1 Provide an Integrated Voice Switching System

Provide telephony services. Support advanced call processing features such as Automated Call Distribution (ACD) and accompanying management reporting systems, Integrated Voice Response (IVR), Customer Call Routing (CCR), predictive dialing, Voice Mail, audio conferencing, call center applications, and Computer Telephony Integration (CTI) applications, Caller Identification Blocking, call waiting, call forwarding, caller ID with name and number, Direct-

Inward Dial (DID), call hold, multiparty conference call, call group pickup, last number redial, speed dial, intercom groups, automatic call back on busy, and other features as required by State users. Provide standardized user operations and capabilities, and custom reports regardless of the user's location and/or department. This system shall integrate into the State's IP data network WAN.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe your organization's proposed solution. Describe, in detail, appropriate modifications to the present system or your proposed system to support future State needs and provide a detailed timeline and estimated costs. Include in the description how your solution will support advanced call processing applications.
- c. Specify the roles the State will play in the design and implementation.
- d. What calling and voice processing features are supported by your organization's proposed voice switching system?

#### 1.8.2 Identify and Eliminate Unused Voice and Data Lines

**The State's inventory of voice and data lines is included as Attachment F. Review the inventory of State-owned lines within 180 days of contract commencement and provide written recommendations on line reduction.** Continuously monitor and update inventory to reflect adds, moves and changes. Disconnect unused voice and data lines subject to State approval. Ensure that costs to the State associated with line counts reflect active lines in use.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will you maintain accurate line counts and associated costs to the State while ensuring that lines needed to accomplish State business are not disconnected?
- c. How will you follow up with suppliers to ensure the disconnect orders have been carried out?

#### 1.8.3 Support Designation of Class of Service

The State's system shall support the capability to define and program differentiated classes of service for users as designated by authorized State personnel.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_

#### 1.8.4 Provide Telephone Sets and Support Calling Features

Support State users with single line or multi-line telephone set as required and specified by authorized State personnel. Support the calling features described



in this RFP, message waiting lamp, and other features as required by the State. Provide support to agencies to add features or services as required.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_

#### 1.8.5 Provide Local Telephone Services

Provide direct-dial local telephone access and services.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe how your organization will meet this requirement.

#### 1.8.6 Provide Long Distance Services

Provide both in-state and out-of-state direct-dial long distance access and services using existing State carrier contracts with or without the requirement for the user to dial additional access codes.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Do you see any problem with eliminating additional access codes for long distance dialing?

#### 1.8.7 Provide Calling Card Services

Provide calling card services, including long distance access, using existing State carrier contracts for State employees as required and designated by authorized State staff.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_

#### 1.8.8 Provide an Integrated Voice Mail System

Provide voice-messaging capabilities and voice menus, auto attendant, fax-on-demand, voice forms, time-of-day controls to all the State's specified users using the existing and/or Contractor proposed State-owned system. This system should be networked State-wide and integrated with the voice switching system and support basic voice messaging capabilities. This system shall support integration into the State's IP-based WAN. The voice mail system should also support user features such as remote accessibility, call forward, fax on demand, auto attendant, voice forms, broadcast message, message distribution, remote notification, voice menus, and time of day controls.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe how you plan to meet these requirements.

#### 1.8.9 Ensure Least Cost Routing

Continually ensure that the voice switching and transmission facilities are appropriately designed, configured and programmed to minimize the overall cost to the State of all outbound calls.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe how your organization will ensure that all outbound calls traverse a path or circuit that will result in the least cost at the time of the call taking into account the State network.

#### 1.8.10 Provide Change Management

Develop policies and procedures (subject to State approval) to ensure error-free transition and maximum availability of voice switching, voice mail and enhanced telephony services system, audio conferencing system, etc., during any new installations, system component upgrades and/or any changes, such as phone numbers and area codes. Ensure that all planned modifications to the telecommunications environment conform to the change control system and procedures.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe your proposed change management system and how your change control methodologies will ensure that: (i) all changes to the telecommunications environment are managed; (ii) changes will be implemented with minimal impact on the State's processing; (iii) that State will be given timely notification of pending changes.

#### 1.8.11 Maintain Systems and Equipment

Provide proactive maintenance activities to ensure the optimal operation of the State's voice switching and transmission facilities, voice mail and enhanced telephony services system, audio conferencing system, etc., as described in the manufacturer specifications, and according to the State's requirements documented in this Contract. Provide users with advance notification of any maintenance activity that may involve a service interruption. Any service interruptions that result from maintenance activities must be minimized and should avoid normal business hours.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe the proactive activities that your organization will perform on the systems to ensure their optimal operations.
- c. Describe how your organization will coordinate these activities with the State.

#### 1.8.12 Provide Trouble Management

Provide expert and timely trouble repair services to the State's voice switching and transmission facilities, voice mail and enhanced telephony services system, audio conferencing system, etc., as specified in the SLAs listed in this RFP. Provide notification to the user of the course of action that will be taken and an approximate time to clear the trouble. Provide notification to the user upon completion of the trouble repair.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet these requirements?

#### 1.8.13 Provide Configuration Management

Maintain configuration documentation and diagrams of the State's voice switching, voice mail and enhanced telephony services system, audio conferencing system, etc., and resources including switching elements, cabling and mapping, etc. This requirement includes any tie lines, DIDs, DODs, switching elements, cabling and mapping, user equipment, user calling features, etc., and their connectivity. Create and maintain a database of State phone numbers serviced within the scope of this Contract and user classes of service.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet these requirements?

#### 1.8.14 Provide Fault Management

Provide a fault isolation plan and capability for the network, subject to State approval. Additionally, provide a means to bypass troubled sections of the network, such as "switch to back-up" capabilities.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet these requirements?

#### 1.8.15 Provide Account Management Services

Monitor and record all data, such as call rating tables, long distance call usage detail and MAC orders, necessary to generate cost allocation reports for local and long distance usage as well as completed MAC orders. Calculate and report and charge back all applicable taxes and provide monthly billing per department for current and past services as well as track payments and balances. Itemized call detail records must include length of each call by phone number and charge. All data must be provided in an electronic format. Data is to be accessible to State agencies for the purpose of conducting State business. **Data shall also be accessible to the State's designated auditors at any time as directed by the appropriate State agency.**

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe your organization's approach to meeting these requirements.

#### 1.8.16 Coordinate, Reconcile and Provide Detailed Billing

Coordinate and reconcile all local, long distance and calling card call detail billing and usage on a monthly basis. Provide billing statements to agencies at the organizational level required by each agency (i.e. department, division or office). Ensure the billing data is provided to the State.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will you meet these requirements?

#### 1.8.17 Project Tracking Billing

The State requires the ability to track and allocate costs on a by-project basis for certain types of intergovernmental projects. Provide project code call tracking and billing as required by individual State agencies.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will you meet these requirements?

#### 1.8.18 Manage System Performance and Operations

Monitor performance and operations of the State's voice switching, voice mail and enhanced telephony services system, audio conferencing system, etc., to ensure that the network is meeting performance and operational requirements of this Contract. Monitor and store traffic patterns and volumes by location to aid in on-going system changes or upgrades.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_

- b. How will your organization meet these requirements?

#### 1.8.19 Provide Capacity Management

Compile network and circuit utilization data in order to appropriately plan and recommend changes in the bandwidth requirements for the State's voice switching, voice mail and enhanced telephony services system, audio conferencing system, etc.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe the data that your organization will use to plan for bandwidth and capacity requirements in the future.

#### 1.8.20 Provide Security Management

Provide appropriate security methodologies and controls, in accordance with State security policies and standards (e.g., expiring password protection, encryption, digital certificates, etc.) at points of public and remote access for the State's voice switching and voice mail systems. Work with the State to identify new areas of security concern as new technology such as IP telephony is implemented. Provide appropriate detection methods to identify unauthorized call monitoring, recording etc. Retain Call Detail Records (CDR) as required by the State and make the data accessible to State agencies for the purpose of conducting State business.

All security management and techniques must meet the State's security policies, standards, practices and the Enterprise Architecture Standard. Additional security requirements include:

- Coordinate with the State's current and future security support organizations, i.e., GITA, Attorney General's Office, Homeland Security, DPS, DEMA, Auditor General's Office, etc.
- Support the development, implementation and evolution of the statewide security program and IT Enterprise Architecture needs and to include but not limited to: critical infrastructure identification, direct response, infrastructure protection, technology watch, technology audits, and education and promotion
- Back up security related data and applications used by the Contractor on a regular basis (especially security access logs). Backup processes are critical requirements for the State's regular operations, disaster recovery and IT security forensic analysis capabilities.

- Provide timely and accurate installation and maintenance of virus protection software, application patches, and required software upgrades for equipment operated by the Contractor.
  - Assist the State with recommendations on IT security contracts and services
- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
  - b. How does your organization propose to control unauthorized access into the voice switching, voice mail networks and networks for IP telephony?
  - c. How will your organization report and investigate attempted and actual security breaches?

#### 1.8.21 Provide Competitive and Economically Favorable Services

Provide the most competitive and economically favorable local, long distance, calling card, and enhanced telephony services on a continuous basis, using existing State carrier contracts, through the life of the Contract.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization ensure that the State receives the most economically favorable rates for each of these service areas?

#### 1.8.22 Provide Service Interruption Notice

Provide notice to all affected users of any planned or unplanned local, long distance, voice mail or enhanced telephony service interruptions, including day, time of day, and estimated duration of outage. Provide ability to reschedule as necessary to avoid interference with critical business processing.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet these requirements?

#### 1.8.23 Provide Move/Add/Change (MAC) Services

Provide any MAC services such as the installation, relocation, and/or disposal of the State's voice switching, voice mail and enhanced telephony services system, audio teleconferencing system, etc., components as requested by authorized State personnel. This includes MACs that may result from building modifications and remodeling. This would also include any software and/or hardware changes necessary to add or remove requested capabilities and features. Provisions must be made to support emergency MAC situations that occur from time to time. Any user and/or system down time resulting from a MAC must be minimized

and clearly communicated in advance to the affected users. Written notification that the MAC was completed will be given to the user(s) affected within the time specified in the SLAs.

- a. Will you meet these requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe in detail how your organization will provide telecommunications MACs.

#### 1.8.24 Manage Upgrades

Plan, implement, and install the State's voice switching, voice mail and enhanced telephony services system, audio teleconferencing system, etc., equipment as recommended by the systems manufacturer and approved by the State (using funds obtained from the process identified in Section 1.7.2). These upgrades should focus on preventing system obsolescence. Additionally, these upgrades should consider the future, long-term requirements of the State. Any user and/or system down time resulting from an upgrade must be minimized and clearly communicated in advance to the affected users.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe your organization's approach, including how you plan to involve the State in the planning process for upgrades.

#### 1.8.25 Maintain Internal Numbering Plan

The State's voice system should utilize an enterprise-wide dialing plan that maintains the current user phone numbers. Calls must be identified by group/department and bills must be able to be allocated to group/department. Identify how internal calls will be processed and billed.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Can your organization implement a standardized five-digit dialing plan for the State facilities? If so, how does your organization propose to minimize the amount of phone numbers that need to be changed and how does it propose to maintain a consistent and standardized dialing format as the number of users change/move, and the area code changes?
- c. How will internal State calls be processed and billed? Specifically, how will calls that are currently on-net be billed?

#### 1.8.26 Provide Input to State Telephone Directory

Provide telephone directory information on current subscribers to the Department of Administration for inclusion in the State Telephone Directory.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet this requirement?

#### 1.8.27 Provide Call Blocking

Provide identification blocking for State lines as required by authorized State personnel.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet this requirement?

#### 1.8.28 Provide Toll-Free Telephone Services

Provide toll free (800) telephone access and services for State agencies. The Contractor shall manage and maintain existing accounts.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet this requirement?

### 1.9 WAN Services

#### 1.9.1 Manage and maintain the existing WAN Capability

Support the existing WAN infrastructure that transports voice, video and data traffic. The Contractor should identify methods and strategies to improve the existing WAN service environment as part of a continuing effort to achieve the goals of the Roadmap.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. What issues, if any, do you see regarding initial use of the State's WAN to provide required services and support the State's goals of convergence?
- c. What steps would you take to improve the existing WAN performance over time?

#### 1.9.2 Develop an Implementation Strategy

Develop an implementation strategy for improving the State's current WAN operating environment should the Contractor identify problems or issues regarding service delivery across the existing WAN. The plan and its implementation should reasonably minimize any system down time or user service interruptions. Before the plan is implemented, the Contractor will need



to obtain approval and funding of the plan from authorized State representatives.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Identify any specific issues related to the converged network migration strategy.
- c. Describe how your organization will include the State in its decision making process.

### 1.9.3 Provide Statewide Connectivity

Provide immediate, real time (near zero time connection) access at all existing State locations within scope of this RFP and provide the same levels of service to future locations.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_

### 1.9.4 Support Multimedia Transport

Support the transport of multimedia applications including voice applications from the voice switching system, video and data from the LANs and Internet.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe any issues or problems supporting this requirement using the existing WAN infrastructure.

### 1.9.5 Provide an Open Architecture

Support open architecture standards and interfaces consistent with the State Enterprise Architecture policies, standards and procedures.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe your organization's proposed network architecture, ensuring compliance with the State's existing Network Architecture standards.
- c. Identify any barriers to implementing open architecture standards in your approach and identify any exceptions.

#### 1.9.6 Provide Virtual Private Networks

Provide virtual private networks (site-to-site and/or remote access) for the secure and controlled transport of confidential information, allowing only authorized users' access to the information.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe how your organization's solution provides this functionality.

#### 1.9.7 Provide Change Management

Develop policies and procedures (subject to State approval) to ensure error-free transition and maximum availability of data network services, Internet connectivity, etc. during any new installations, system component upgrades and/or any changes. Ensure that all planned modifications to the LAN/WAN environment conform to the change control system and procedures.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe your proposed change management system and how your change control methodologies will ensure that: (i) all changes to the telecommunications environment are managed; (ii) changes will be implemented with minimal impact on the State's processing; (iii) that State will be given timely notification of pending changes.

#### 1.9.8 Maintain Systems and Equipment

Provide proactive maintenance activities to ensure the optimal operation of the Wide Area Network, including hardware and software, as described in the manufacturer specifications, and according to the State's requirements and the SLA documented in the agreed SLA. Provide users with advance notification of any maintenance activity that may involve a service interruption. Any service interruptions that result from maintenance activities must be minimized and should avoid normal business hours.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe the proactive activities that your organization will perform on the systems to ensure their optimal operations.
- c. Describe how your organization will coordinate these activities with the State.

#### 1.9.9 Provide Trouble Management

Provide expert and timely trouble repair services to the State's Wide Area Network system and Internet connectivity services as specified in the agreed SLAs. Provide notification to the user of the course of action that will be taken and an approximate time to clear the trouble. Provide notification to the user upon completion of the trouble repair.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet these requirements?

#### 1.9.10 Provide Configuration Management

Maintain configuration documentation and diagrams of the State's Wide Area Network systems and resources including routers, switching elements, cabling and mapping, etc., including any tie lines, switching elements, cabling and mapping, monitoring equipment, etc., and their connectivity.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet these requirements?

#### 1.9.11 Provide Fault Management

Provide a fault isolation plan and capability for the network, subject to State approval. Additionally, provide a means to bypass troubled sections of the network, such as "switch to back-up" capabilities.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet these requirements?

#### 1.9.12 Provide Account Management Services

Monitor and record all data necessary to generate cost allocation reports for WAN and ISP usage. Calculate and report and charge back all applicable taxes and provide monthly billing per department for current and past services as well as track payments and balances. All data must be provided in an electronic format as specified by the State and accessible to State agencies for the purpose of conducting State business. Data must also be available to the State's designated auditors at any time as directed by the appropriate State agency.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet these requirements?

#### 1.9.13 Manage WAN System Performance and Operations

Monitor Statewide Wide Area Network systems performance and operations to ensure that the network is meeting performance and operational requirements as specified in the SLAs. The State requires network management performed on a 24x7, 365 days per year basis. Monitor and store traffic patterns and volumes by location to aid in on-going system changes or upgrades. Provide the State with monthly reports on overall WAN system performance and provide access for designated State personnel to real-time network monitoring tools and measurement results at any time the State requests.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet this requirement?

#### 1.9.14 Manage Internet Services Performance and Operations

Monitor statewide ISP systems performance and operations to ensure that the network is meeting performance and operational requirements as specified in the SLAs. Monitor and store traffic patterns and volumes by location to aid in on-going system changes or upgrades.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet this requirement?

#### 1.9.15 Provide Capacity Management

Compile network and circuit utilization data in order to appropriately plan and recommend changes in the bandwidth requirements for the State's Wide Area Network systems and Internet connection services.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe the data that your organization will use to plan for bandwidth and capacity requirements in the future.

#### 1.9.16 Provide Security Management

Provide appropriate security methodologies, in accordance with State security policies and standards (e.g., encryption, firewalls, tunneling, digital certificates, etc.) at points of public and remote access for the State's Wide Area Network and ISP systems. Work with State Security personnel to identify and reduce the number of Internet connections not managed by the Contractor. The Service Provider shall also work with the State concerning intrusion prevention, honey pots, security log management, secure transports, distributed security authorities and other security related topics.

All security management and techniques must meet the State's security policies, standards, practices and the Enterprise Architecture Standard. Additional security requirements include:

- Coordinate with the State's current and future security support organizations, i.e., GITA, Attorney General's Office, Homeland Security, DPS, DEMA, Auditor General's Office, etc.
  - Support the development, implementation and evolution of the statewide security program and IT Enterprise Architecture needs and to include but not limited to: critical infrastructure identification, direct response, infrastructure protection, technology watch, technology audits, and education and promotion
  - Back up security related data and applications used by the Contractor on a regular basis (especially security access logs). Backup processes are critical requirements for the State's regular operations, disaster recovery and IT security forensic analysis capabilities.
  - Provide timely and accurate installation and maintenance of virus protection software, application patches, and required software upgrades for equipment operated by the Contractor.
  - Assist the State with recommendations on IT security contracts and services
- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
  - b. How does your organization propose to control unauthorized access into its networks, including the WAN?
  - c. If your organization is providing a WAN that will be used by parties other than the State, how does it propose to ensure the security of all State information while preventing performance degradations?
  - d. How will your organization report and investigate attempted and actual security breaches?

#### 1.9.17 Provide Competitive and Economically Favorable Services

Provide the most competitive and economically favorable data network and Internet services on a continuous basis through the life of the Contract.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization ensure that the State receives the most economically favorable rates for each of these service areas?

#### 1.9.18 Provide Service Interruption Notice

Provide timely notice to all affected users of any planned or unplanned data network service or ISP interruptions, including day, time of day, and estimated duration of outage. Provide ability to reschedule as necessary to avoid interference with critical business processing.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. How will your organization meet this requirement?

#### 1.9.19 Coordinate, Reconcile and Provide Detailed Billing

Coordinate and reconcile all data network service and ISP billing and usage on a monthly basis. Provide billing statements to agencies at the organizational level required by each agency (i.e. department, division or office). Ensure the billing data is provided to the State for review if requested. All billing data must be available to appropriate State agencies and State designated auditors at any time for the purpose of conducting State business. The State wants to utilize usage based billing methodologies (metering, measured tariffing, etc.) as a means to provide feedback and bills to State users for data network utilization.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. How will you meet these requirements?

#### 1.9.20 Provide Move/Add/Change (MAC) Services

Provide any MAC services such as the installation, relocation, and/or disposal of the State's data switching and Wide Area Network components as requested by authorized State personnel. This includes MACs to systems that may result from building modifications and remodeling. This would also include any software and/or hardware changes necessary to add or remove requested capabilities and features. Provisions must be made to support emergency MACs that occur from

time to time. Any user and/or system down time resulting from a MAC must be minimized and clearly communicated in advanced to the affected users. Written notification that the MAC was completed will be given to the user(s) affected within the time specified in the SLAs.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe how your organization will coordinate WAN MACs with State-provided LAN MACs.

#### 1.9.21 Manage Upgrades

Plan, implement, install and upgrade State's Wide Area Network and ISP systems and equipment as recommended by the systems manufacturer and approved by the State (using funds obtained from the process identified in Section 1.7.2). These upgrades shall focus on preventing system obsolescence and providing performance that meets or exceed the agreed SLAs. Additionally, these upgrades should consider the future, long-term requirements of the State. In particular, the Contractor shall provide upgrades to achieve the goals and vision of the Roadmap. Any user and/or system down time resulting from an upgrade must be minimized and clearly communicated in advance to the affected users.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe your organization's approach to meeting these requirements.
- c. Describe how your organization plans to involve the State in the planning process for upgrades.

#### 1.9.22 Provide IP Address Management

**Within 180 days of contract commencement, review the existing State IP address plan and provide recommendations on how best to meet the requirements identified in the Roadmap. Work with the State to develop an implementation plan to renumber addresses as required meeting the State's requirements. Assume responsibility as the numbering authority for the State and manage all State IP addresses.**

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe your organization's approach.

- c. Describe how your organization plans to collaborate with the State in the planning process for IP addressing.

### **1.10 Help Desk/Service Desk**

As described earlier in this document, ATS currently provides a number of end-user support services to State employees including help desk, user training, configuration management, etc. ATS also provides the primary user interface for coordinating Provider-side support services including problem resolution management, MAC management, service level adjustments, and service extensions. Although the State currently uses Remedy, a Help Desk software package, the Contractor may choose to use something else. The Contractor shall meet the responsibilities required by the SLAs in this RFP. As noted earlier, the State expects the Contractor to supply a single point of contact for coordinating all aspects of the services identified as in-scope in this RFP; this also includes Help Desk calls that would need to be referred back to ISD computer services for resolution or referred back to other agencies Help Desks. This single point of contact will be responsible for providing all User-to-Contractor interface and Prime Contractor-to-Subcontractor interface coordination functions including: user help desk for in-scope services; trouble reporting; problem resolution management; configuration management coordination; change management coordination; MAC management; SLA modification management; service extension management, etc. The State expects that this service will be properly staffed to meet the responsiveness requirements dictated by the SLAs contained herein, including 24 hour-a-day, seven day-a-week availability. Data in the Help Desk database must be available to the appropriate State agency and/or its designated auditors at any time.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe any issues that would preclude complete coordination of all changes through a centralized change control system.
- c. Describe, in detail, how your organization plans to meet the requirements for a centralized coordination, control and help desk function.

#### **1.10.1 Provide 24x7x365 Availability**

Respond to user inquiries and trouble requests on a 24x7x365 basis. State departments vary their hours of business. Some State departments are in business on a 24x7x365 basis (e.g., health, public safety) while other departments have specific functions that need to be processed after business hours. Although the highest demand for Help Desk services is expected during State business hours (6:00 a.m. to 6:00 p.m.), the Contractor must ensure adequate Help Desk



staff, trained to handle calls in their areas of expertise, provided around the clock.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe how you typically structure and organize your Help Desk operations.
- c. Describe how you would resolve problems that affect multiple service bundles simultaneously.
- d. Describe how you would resolve problems that affect systems utilized in multiple jurisdictions (e.g., emergency medical systems).
- e. Describe your organization's methodology for supporting end-users on a 24x7x365 basis.
- f. Describe where your organization's help desk is planned to be located.
- g. Describe the management tools and trouble-ticket processes that your organization uses to support customer service efforts. Will e-mail-based support be provided?

#### 1.10.2 Serve as a Single Point-of-Contact

Provide end-users with a single point-of-contact for all telecommunications-related questions, requests, and problems. Coordinate troubleshooting services provided by subcontractors, the ISD Computer Services Section (mainframe support) and other Help Desk operations, if necessary, to resolve user problems.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe how you would transition the State Help Desks into a single, integrated Help Desk operated by the Contractor. Include migration timeframes.

#### 1.10.3 Ensure Qualified Help Desk Staff

Ensure that Help Desk staff are qualified and trained in voice, video, data networks, and other technology-related systems and products.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe your approach to maintaining an adequate level of knowledge for the various IT and telecommunications services required in centralized Help Desk staff.
- c. Describe the technologies and products that your help desk staff will be qualified and certified on.

#### 1.10.4 Resolve Help Desk Problems

Troubleshoot calls that do not require service dispatch and achieve at least a 75% problem resolution. For calls that require in-depth technical assistance and service dispatch, ensure timely escalation of problems.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe your approach to meeting the 75 percent Help Desk resolution for calls that do not require service dispatch as indicated in the Minimum Acceptable Service Levels (MASL). Indicate any Help Desk documentation, tools, etc., provided to Help Desk staff that will facilitate the fulfillment of this MASL.
- c. Describe the methodology that your organization uses to provide on-site support to end-users if your organization is not able to resolve particular problems from a remote help desk. Provide examples of your organization's service levels with respect to problem escalation.
- d. Describe your escalation process and how you would coordinate with subcontractors to resolve Help Desk problems within the timeframes specified in the MASLs.

#### 1.10.5 Manage the Entire Life-Cycle of Help Desk Calls

Answer end-user Help Desk calls which may be received from phone, fax, or Web input, record problems in a database package, manage problems through the entire problem life cycle of open, assign, accept, escalate, fix and close. The Help Desk should manage repairs to completion and resolve all subcontractor disputes in a manner that is transparent to the end user. Answer calls within the timeframe defined in the Minimum Acceptable Service Level (MASL). Notify end-user by telephone, email, etc., when a trouble call has been resolved. Maintain an enterprise problem management system, and end-user Help Desk Web page that provides current status of all problems.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe the life-cycle of a Help Desk call, starting from the time a call is received to the time the call is resolved and closed out. Include a description of all tools utilized within your Help Desk operations, including Help Desk tools proposed that monitor user equipment and inventory.
- c. Describe your procedure to elevate the priority of unresolved Help Desk calls.

#### 1.10.6 Prioritize Help Desk Calls

Obtain from the State a list of priority State executives and mission critical users. Provide immediate attention and quick resolution to the defined State executives and mission critical uses.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe your approach for resolving multiple mission critical situations that occur simultaneously.

#### **1.10.7 Provide Continuous Improvement**

Maintain a continuous improvement practice that improves Help Desk services. Provide for follow-up on work stoppages and missed service levels that the State has designated for all service bundles. In addition, analyze problem calls and trends to determine root causes, and coordinate with technology groups and end-users to implement solutions that minimize the need to call the Help Desk.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe your approach to continuously improving the State's Help Desk operations.
- c. Are you ISO 9000 certified?

#### **1.10.8 Conduct End-User Satisfaction Surveys**

Conduct end-user satisfaction surveys in accordance with processes and protocols to be established and agreed upon by the State and Contractor.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Explain how you will meet this requirement and provide examples of how you have obtained consistent end-user satisfaction.

#### **1.10.9 Ensure Real-Time Updates of Moves, Adds and Changes**

Serve as central point of contact for managing the end-user information database. Ensure end-user information is up to date so that operator staff has access to the latest end-user information and that Help Desk staff has accurate information to perform preliminary diagnostics.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe your approach to ensuring that the end-user database is updated on a real-time basis.

#### **1.10.10 System Performance Reports**

In addition to reports described in the previous sections, the Contractor will report on:

- Overall voice, data and video network availability and utilization by site and organization.
- Information pertinent to identifying the source of any unauthorized attempt, whether successful or unsuccessful, to gain access to any of these systems.
- Number of critical and non-critical network repairs as well as scheduled vs. unscheduled maintenance activity, the duration of each repair from the time that the outage was reported or monitored to the time that the service was restored and the estimated number of customers affected by the outage.
- Quarterly “not active” reports identifying lines that are not in use or have not had activity.
- Peak and average monthly utilization by shift on all wide area circuits.
- Trend analysis reports including any appropriate data that will aid in future planning and quality of service.

a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_

### **1.11 Billing and Auditing**

The Contractor is expected to operate and maintain a billing and payment function capable of supporting the telecommunication requirements of the State. The Contractors system is expected to replace the billing and payment system currently used by ATS with an entirely new system since the current system is deemed inadequate to meet current requirements. The Contractor must track all relevant charges; bill customers for services rendered monthly and use proceeds of revenue to pay for costs incurred. The Contractor shall treat purchases off State contracts for carrier services as a pass-through on Agency billing statements.

The State will not accept costs for termination of State contracts for voice and data, including hardware and software maintenance, therefore, the Contractor will be expected to continue with many of these contracts.

The Contractor shall be responsible for billing State agencies directly as well as the collection of funds from those agencies for services billed.

The Contractor will determine what maintenance contracts they shall provide to meet their negotiated SLAs with the State. Maintenance contracts shall be paid out of service fees paid by State agencies to the Contractor. The Contractor shall assume responsibility for managing existing maintenance contracts and

coordination with the State on any service or repairs under the maintenance contracts.

The State shall use an outside auditor to perform a yearly audit of the Service Provider's accounting system and provide a written report to the State. The Contractor shall fully support this activity.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Describe your proposed billing system to replace the existing system used by ATS and explain how your system meets the State's requirements.
- c. Describe the process used to customize features in your system.
- d. How will your organization transition the State to your billing and auditing system?
- e. How will you involve the various State agencies in bill reconciliation and dispute resolution?

#### **1.12 Additional Work Process**

This Contract may be modified to include additional related services, including additional State agencies to achieve unit cost savings through economies of scale. If additional requirements are identified, the Program Manager may request a technical and price proposal from the Contractor. The Program Manager may negotiate changes to the proposal, reject the proposal or authorize the additional services by issuance of a Contract Modification, in accordance with Special Terms and Conditions, Negotiated Additional Work Order - Requirements Contract. This is not an exclusive Contract and the State may, at its sole discretion, award contracts to other parties for related services.

#### **1.13 Cost Savings**

The Contractor is encouraged to propose cost saving alternatives during performance of the Contract. The State will share a portion of the actual cost savings resulting from the Contractor's proposal as an incentive. The State may reject the proposal or authorize the proposal by issuance of a Contract Modification, in accordance with Special Terms and Conditions, Change Orders, Fixed Price Work Orders.

#### **1.14 Develop Roadmap Implementation Plan**

As described earlier, the State has prepared a high-level Roadmap regarding migrating the State from a decentralized telecommunications environment to a centralized telecommunications environment. The Plan calls for privatizing ATS customers first and over a period of time to migrate all other Executive Branch agencies to the centralized telecommunications system. The Roadmap also calls for migration from a circuit-

based voice system to a packet-based voice and data system using IP telephony technology if a business case can be made for the transition.

The State requires each potential provider to analyze the Roadmap and provide to the State a high-level plan on how you propose to implement the Roadmap with their RFP response. The Contractor shall implement its Plan for Roadmap implementation, subject to State approval.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Please describe any previous involvement in developing similar strategies.
- c. Please provide your Roadmap implementation plan with your RFP response.

### 1.15 Develop Statewide Convergence Plan

The State envisions a statewide service network infrastructure that supports voice, data and video communications services, including advanced voice and data network management capabilities and communications features as envisioned in the Roadmap. The primary goals behind such an infrastructure are to achieve (i) greater levels of cost/performance, (ii) statewide telecommunications connectivity between and among all agencies and departments, (iii) optimum network resource and bandwidth management, and (iv) operational interoperability among agencies and agency partners. The State envisions its service infrastructure as able to support all of its business objectives, including:

- **Reliability** - protect and improve the quality and dependability of both routine and critical telecommunications.
- **Productivity/Efficiencies** - facilitate the development and/or delivery of services that will increase the productivity and effectiveness of State employees.
- **Public Accessibility** - facilitate the ability to deliver services at locations that are more convenient for the public including their homes or businesses via the Internet. Such services may include permits, data retrieval, licensing, general information, etc.
- **Business Partners** - facilitate the ability to inter-work with the networks, data and applications of community business partners.
- **Cost Management** - minimize the cost of delivering services both internally and externally to the public, as well as reduce State administration costs.
- **Improved Rural Communications** - assist State with developing and implementing a program to leverage investments in the infrastructure

required to meet the State's needs and to improve general access to quality telecommunications services throughout the State.

- **Universal Availability** - the infrastructure should facilitate connections to every agency, department and user within the State. This should also include remote accessibility for telecommuting and Internet access.
- **Open Platform** - technical compatibility among equipment must be assured. The infrastructure must be standards based, meet requirements of the State Enterprise Architecture Standard (Exhibit D) and related policies, standards and procedures (Exhibit M) and be capable of being connected to other private and public networks and equipment.
- **Flexible Bandwidth Allocation** - there must be available capacity beyond current demand, ensuring that access will not soon be denied for capacity reasons. There should also be the ability to easily allocate the appropriate capacity to users (i.e., bandwidth on demand). Furthermore, the State should not bear undue cost burdens associated with unutilized capacity – bandwidth should expand and contract as required to meet the State's needs.
- **Effective Network Management** - provide monitoring tools and planning mechanisms to enable State telecommunications professionals to proactively manage both the demand and supply sides of the telecommunications environment.
- **Security** - facilitate the necessary technologies and protocols that ensure the security and confidentiality of State information including personal information, personnel records, medical records, criminal records, public safety data, and proprietary management reports.

The State requires each RFP respondent to submit with their RFP response a convergence plan of sufficient detail to enable the State to understand the approach and strategies contemplated by the Contractor (in all of the above areas). In addition, within 180 days of contract commencement, Contractor must create a more detailed plan (consistent with the high level plan submitted with their RFP response) for this new service environment including a comprehensive migration strategy, including estimated costs, to a statewide converged network from the current service infrastructure. The Contractor must monitor, maintain and administer the new service infrastructure, ensuring its optimum performance and appropriate technology refreshes. The Contractor may include different pricing mechanisms, e.g. use of Contractor-owned assets, that might be more beneficial to the State.

The Contractor is required to provide a statewide telecommunications service system to support fully integrated voice, data and video capabilities. Until such time as the Contractor has completely transitioned services to their ultimate

service configuration, the Contractor shall completely support the State's current systems and provide network management services.

- a. Will you meet this requirement? Y\_\_\_\_ N\_\_\_\_
- b. Please provide your convergence plan with your RFP response.
- c. Describe how you will work with the State to develop the more detailed Statewide Convergence Plan due 180 days from contract commencement.

### **1.16 Human Resource Issues**

The State of Arizona is committed to the fair and equitable treatment of our employees that may be affected by this outsourcing effort. We recognize that these employees possess both skill sets and retained knowledge important to the future success of telecommunications for the State of Arizona. The State of Arizona expects the Contractor to interview interested impacted employees and seriously consider hiring them. Attachment G contains a detailed list of potentially impacted positions and their cost to the State for the initial implementation. In addition, as additional agencies are transitioned to the outsourced environment, the State will provide similar information regarding potentially impacted personnel to the Contractor. The Contractor must handle these personnel consistent with their handling of personnel impacted during the initial transition period.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe any issues your organization has with regard to the requirement to interview interested impacted State employees.
- c. Describe how your organization proposes to handle the transition of the affected State's telecommunications professionals. Describe how they will be integrated into your organization, including duration and timing of events.
- d. Describe the benefits, and benefit programs, that the State's telecommunications professionals hired by your organization can expect to receive from your organization, including prior service credits applicable to employee benefits if possible.
- e. Describe the employment opportunities that exist in your organization for State telecommunications professionals. What assurances will such employees have that they will be given opportunities comparable to those of your organization's current employees?
- f. What professional and technical training programs will your organization implement to assist State telecommunications employees hired by your organization to advance professionally in your organization?



### 1.17 Transition Period

The Contractor shall: (i) assume full management responsibility and provide all in-scope telecommunications services and support to the State; (ii) ensure the proper and orderly functioning of all State equipment as designated by the respective equipment manufacturers; and (iii) meet existing service levels in support of the State's on-going functional requirements as defined in the Contract.

The Contractor shall implement an expeditious and seamless transition of services, without interruption, from the State's current services to those within the scope of this RFP. On the effective date of the Contract, the Contractor will assume responsibility for, and begin providing all current services, maintain all current systems, and meet current service levels experienced by the State currently being provided by ATS. The Contractor's transition plan shall include, among other things: the manner in which the Contractor will assume responsibility after the effective date of the Contract for: the provision of services; billing and cost reimbursement details with ATS; assumption of major projects; management of assets and resources; communication with the State's departments, other public entities, and private entities; the State's current third-party contractors, including management of existing contracts and licenses, subcontracting or cancellation of contracts, to the extent practicable; and subcontractor relationships and arrangements. After the transition period, the State's departments affected under the scope of this RFP will cease to provide telecommunications services to themselves or others. The details and timing of the transition plan shall be included in the proposal.

- a. Will you meet this requirement? Y\_\_\_\_\_ N\_\_\_\_\_
- b. Provide your organization's detailed transition plan. The transition plan must include sections that identify the tasks, timeframes for the tasks, milestones, roles and responsibilities for the State and Contractor personnel, and any major task contingencies. For all tasks identified in the transition plan, provide a responsibility matrix that identifies the key party responsible for the task and the supporting party, if any. For all tasks where State responsibilities are identified (including support), provide a description of the task and the estimated level of effort, based on your organization's experience in performing similar transitions.
- c. Describe how your organization proposes to meet or exceed current service levels during the transition period.
- d. Describe in detail your organization's experience in managing complicated transitions involving dispersed, decentralized telecommunications and IT environments.
- e. Describe the anticipated impact that the transition will have on "normal" State business operations. Identify the anticipated disruption that

- transition tasks will have on the State's normal work environment and how your organization will minimize and manage any disruption.
- f. The State recognizes that during the transition period, there will be considerable activity, including new employees being brought in by your organization. The State feels particularly vulnerable to breaches in security and the omission of normal tasks that could have serious impact on the State's operations. Describe the process your organization will implement during the transition period to ensure the integrity and security of the State's operations.
  - g. How does your organization propose to handle the transition of State-owned equipment, software, and telecommunications assets for your operation and maintenance including any relocation of equipment?

### **1.18 Disaster Recovery**

Each agency in the State is currently responsible for its own Disaster Recovery plan for Data Center, distributed database and desktop computing resources. The Contractor is required to develop and document a Statewide Disaster Recovery plan, within 300 days after contract commencement, that provides for recovering the State's telecommunications systems the Contractor is responsible for within established recovery requirement timeframes (to be established in Plan) after a disaster occurs affecting State telecommunications. During the term of the Contract, the Plan must be updated annually.

- a. Will you meet these requirements? Y\_\_\_\_ N\_\_\_\_
- b. Describe your approach to providing continuous operations of the State's systems you plan to operate and maintain.
- c. Describe your organization's proposed solution for providing Disaster Recovery services to the State.
- d. Will your organization allow the State to declare a telecommunications disaster? If so, describe the implications to the State should it declare a disaster.
- e. Describe how your organization will ensure the availability of State data under your control during Disaster Recovery.
- f. Describe your organization's proposed approach for implementing network connectivity between State facilities and any proposed recovery site(s).
- g. Describe your organization's approach to supporting connectivity from alternate State office locations to the State's data center(s). Describe how you expect the State to be involved in developing its Disaster Recovery Plan. Describe how you will involve the State in any actual recovery process.

- h. Describe the scope of recovery testing the State may anticipate. Describe how you expect the State to participate in recovery testing.
- i. Describe how you will implement priority services to the Governor and other designated State officials.

### **1.19 Exit Strategy**

The Contractor shall perform, in accordance with the Contract, through the date of termination or expiration of the Contract. The Contractor shall cooperate with and assist the State and any replacement contractor(s) with the contract termination or expiration transition, including:

- Provide access to systems, infrastructure and processes;
- Return all property of the State, including data, reports, documentation, drawings, equipment and software;
- Consult with State and Contractor personnel;
- Identify all State and Contractor owned property; and
- Train State personnel on any new systems acquired during performance of the Contract.

The Contractor shall also waive any employment restrictions or conditions for Contractor's employees and shall not interfere with the employee's ability to seek employment with the State or the replacement contractor.

- a. Will you meet these requirements? Y\_\_\_\_\_ N\_\_\_\_\_
- b. Does your organization suggest an alternative to a three (3) year initial term for its service relationship with the State? If so, explain your approach and benefit to the State.
- c. The State requires the contractual ability to unilaterally terminate the relationship upon the occurrence of certain events, including insufficient budget appropriations. Describe how your organization would accommodate the State's need for such unilateral termination?
- d. Is your organization willing to agree to give the State the option, upon reasonable notice to your organization, to terminate parts or all of the services provided under the Service Agreement, without incurring any termination charges or costs other than the remaining unamortized portion of the Contractor's transition or conversion costs and initial capital infusion? Describe any anticipated impact in invoking such an option. What is your advance notice requirement?
- e. In the event of the expiration or termination of the relationship between the State and your organization, will your organization:
  - a. Agree to cooperate with the State or the new Contractor and otherwise take all reasonable steps to assist the State in effecting a

smooth disentanglement upon the expiration or termination of the Service Agreement?

- b. Agree not to interrupt the provision of services to the State or any obligations related to disentanglement, disable any hardware used to provide services, or perform any other action that prevents, slows down, or reduces in any way the provision of services or the State's ability to conduct its activities, unless the State agrees that a satisfactory disentanglement has occurred? Describe your organization's general approach to the disentanglement process.
- c. Provide the State or another Contractor with access to any specialized systems, technology, or processes that have been employed in servicing the State?
- d. Permit the State or the new Contractor to offer employment to your organization's employees involved in providing in-scope services? Waive any contractual agreements made with these employees, if not prohibited by law?

## **Attachments**

- A. State of Arizona Telecommunications Roadmap
  - Includes: A. List of Related Statewide IT Contracts; B. Project Oversight Diagram*
- B. ATS Customers
- C. Voice Diagrams
- D. Enterprise Architecture Standard
- E. Hardware Inventory
- F. Circuit Inventory
- G. Employee Data
- H. Arizona Telecommunications Services (ATS) FY 2004 Rate Schedule
- I. ATS Maintenance Contracts
- J. Minimum Acceptable Service Levels
- K. Governor's Memorandum to State Agency Directors
- L. ATS Cost Model FY 2003
- M. Table of Related Policies, Standards and Procedures URLs
- N. State of Arizona PBX Systems (as of November 2002)
- O. State of Arizona Key Systems (as of November 2002)
- P. State of Arizona Executive Branch Agencies (including FTEs)

## **Exhibit**

- A. Pricing Comparison
- B. Pricing Schedule
- C. Price Buildup